

Agency User Guide



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DATA MANAGEMENT SOLUTIONS

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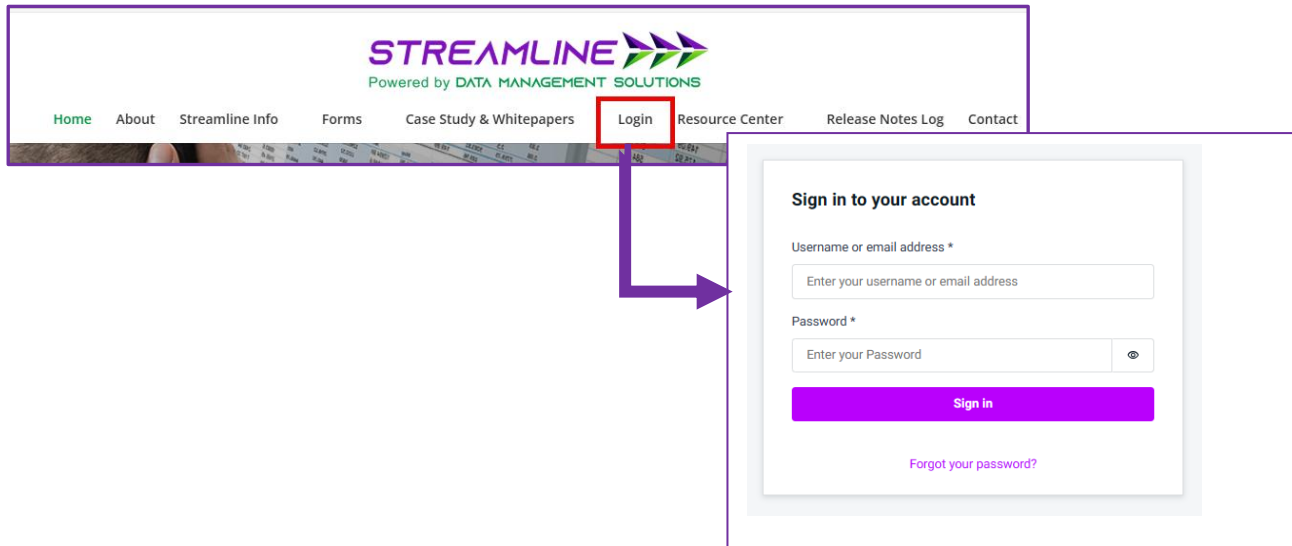
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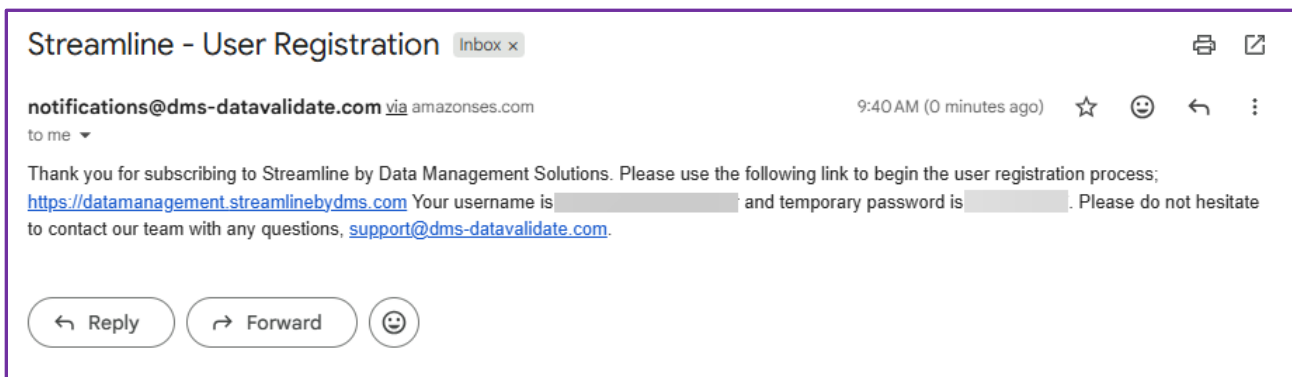
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Login

The Streamline application can be accessed from <https://streamlinebydms.com/> using supplied username or registered email address. A temporary password is provided in the registration email and requires an update during the registration process.



Registration Email Example:



Users

The Streamline application supports six (8) user types, each with varying levels of access and functionality:

1. **Agency User – Full Access**

Provides complete access to all features within the application, including the ability to add and deactivate users. Please note that currently only Streamline support staff have the ability to add Agency users.

2. **Agency Task Comparer – Limited Access**

Allows full compare and merge functionality, but only for designated (whitelisted) organizations. This role has access to the Eligibility Management Tracking Module but with view only access to the Renewals and Carriers.

*** Please note that currently only Streamline support staff have the ability to add Agency users.

3. **Organization Admin – Full Access**

Provides complete access to all features within the application, including the ability to add and deactivate users.

4. **Organization Comparer – Limited Access**

Allows full compare and merge functionality, but only for designated (whitelisted) companies. This role does not have the ability to add new companies.

5. **Organization Task Manager – Limited Access**

Grants the same permissions as the Organization-Level Comparer, excluding access to compare and merge functions.

Note: This user type does not count against your licensed user seats. You may create an unlimited number of Task Managers.

6. **Organization Verifier – Partial Access**

Permits verification of discrepancies and missing data for existing compares. Compare and merge functionality is not available for this role.

Note: This user type does not count against your licensed user seats. You may create an unlimited number of Organization Verifiers.

7. **Company-Level Admin – Limited Access (Platinum Elite Plan only)**

Offers full compare and merge capabilities, but only for the specific company under which the user is created. This role is exclusive to the Platinum Elite subscription.

8. **Company-Level Verifier – Partial Access**

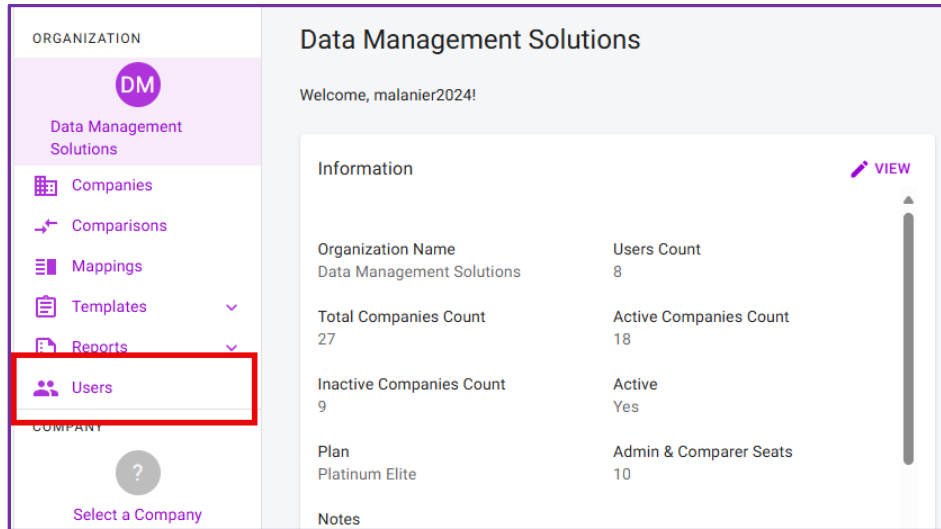
Allows verification of discrepancies and missing data for existing compares within a single company. This role does not include compare and merge functionality.

Note: This user type does not count against your licensed user seats. You may create an unlimited number of Company Verifiers.

Only Agency level users are discussed in this set of instructions. Please reference the Organization and Company Level User process documents for information pertaining to those levels.

Adding an Organization Admin user

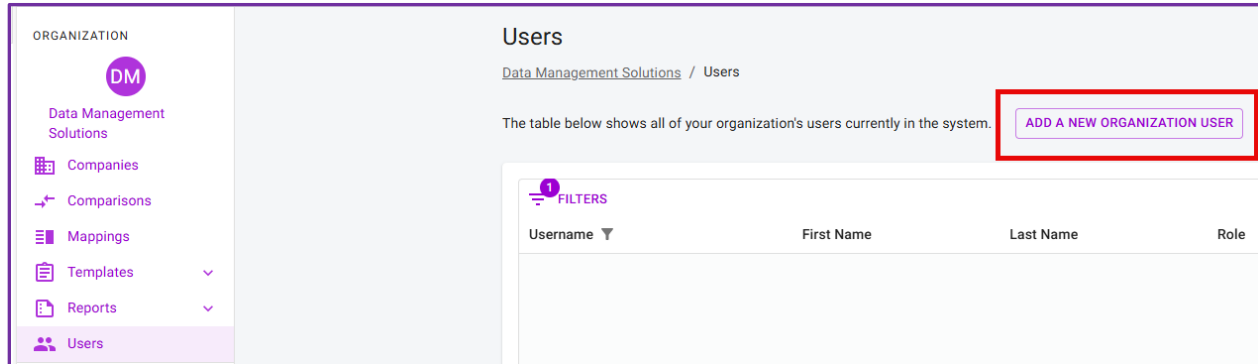
Select USERS under the desired organization.



The screenshot shows the 'Data Management Solutions' dashboard. On the left sidebar, under the 'ORGANIZATION' section, the 'Users' option is highlighted with a red box. The main content area displays a welcome message and an 'Information' section with various statistics.

Information	
Organization Name Data Management Solutions	Users Count 8
Total Companies Count 27	Active Companies Count 18
Inactive Companies Count 9	Active Yes
Plan Platinum Elite	Admin & Comparer Seats 10

Select ADD A NEW ORGANIZATION USER.



The screenshot shows the 'Users' page. The left sidebar is the same as the previous screenshot. The main content area has a header 'Users' and a breadcrumb 'Data Management Solutions / Users'. Below the header, there is a message: 'The table below shows all of your organization's users currently in the system.' To the right of this message, the 'ADD A NEW ORGANIZATION USER' button is highlighted with a red box. Below the message, there is a table with columns: Username, First Name, Last Name, and Role. The table is currently empty.

Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user.
Please note that the email address and username CAN NOT be changed once saved.

Add New Organization User

[Data Management Solutions](#) / [Users](#) / Add New Organization User

Complete the form below to add a new Organization User to the system.

New User

Billing Contact

☐ Billing Contact

Access Level

Organization Admin ▾

Organization
Data Management Solutions

Role
☒ ORGANIZATION_ADMIN

SAVE

In the Access Level dropdown, select the user type: Organization Admin. This access level has full site functionality including adding and inactivating users.

Once all applicable information has been entered click Save. Whitelisted functionality is not available as the user has admin access.

The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding an Organization Comparer user

Select USERS under the desired organization.

ORGANIZATION

DM
Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users**

COMPANY ?
Select a Company

Data Management Solutions

Welcome, malanier2024!

Information

[VIEW](#)

Organization Name Data Management Solutions	Users Count 8
Total Companies Count 27	Active Companies Count 18
Inactive Companies Count 9	Active Yes
Plan Platinum Elite	Admin & Comparer Seats 10

Notes

Select ADD A NEW ORGANIZATION USER.

ORGANIZATION

DM
Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users**

Users

[Data Management Solutions](#) / [Users](#)

The table below shows all of your organization's users currently in the system.

ADD A NEW ORGANIZATION USER

FILTERS

Username	First Name	Last Name	Role

Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user.
Please note that the email address and username CAN NOT be changed once saved.

New User

Billing Contact
☐ Billing Contact

Access Level

Organization Compare Access

Whitelisted Companies

Select the companies that this user should have access to.

A Touch of Pink Bakery, ABC Company, ...

SELECT ALL REMOVE ALL

Organization
Data Management Solutions

Role
☒ ORGANIZATION_COMPARER

SAVE

In the Access Level dropdown, select the user type: Organization Compare Access. Organization Compare Access level has limited functionality. This level has full compare and merge functionality but only for whitelisted companies.

By default, this user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.

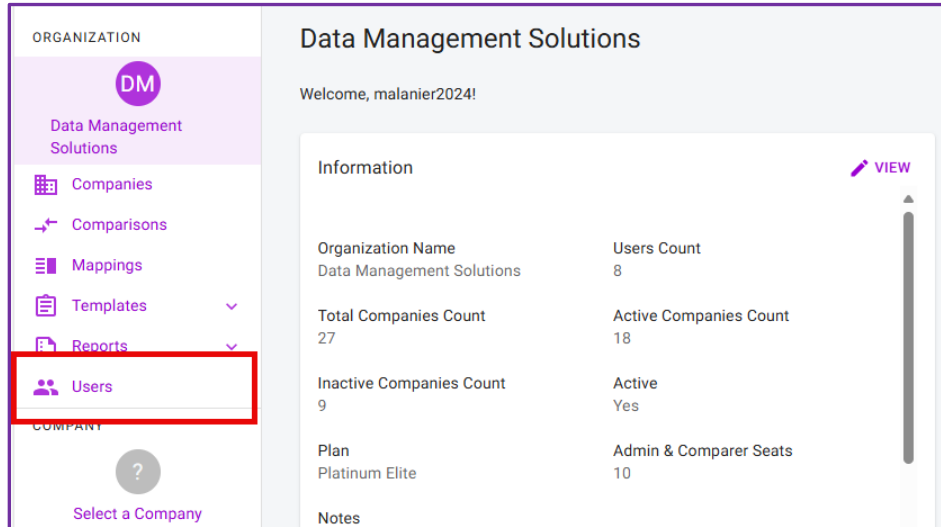
☒ ABC Testing
 ☒ Daphney Testing Company
 ☒ Dreamworks
 ☒ HiraK's Company
 ☒ Import Company
 ☒ Marvel Company

Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding an Organization Task Manager user

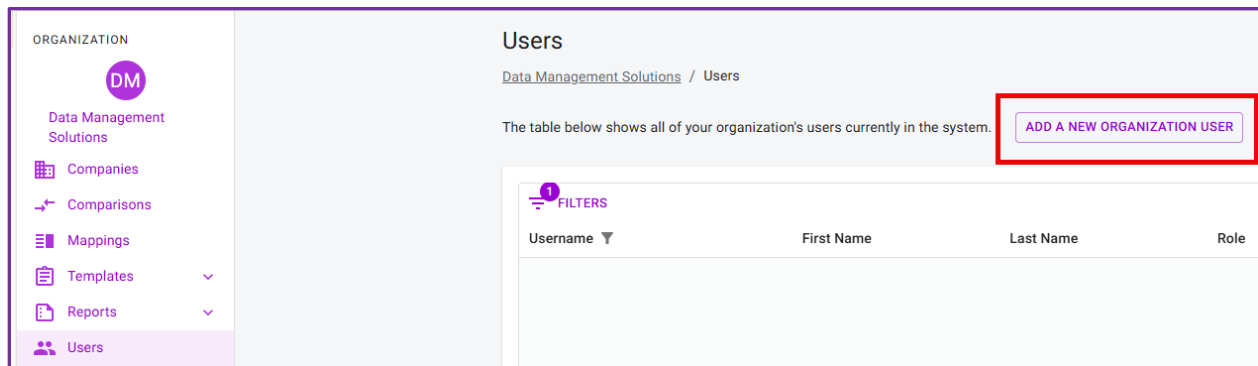
Select USERS under the desired organization.



The screenshot shows the 'Data Management Solutions' dashboard. On the left sidebar, under the 'ORGANIZATION' section, the 'Users' option is highlighted with a red box. The main content area displays a welcome message and an 'Information' section with various statistics.

Information	
Organization Name Data Management Solutions	Users Count 8
Total Companies Count 27	Active Companies Count 18
Inactive Companies Count 9	Active Yes
Plan Platinum Elite	Admin & Comparer Seats 10

Select ADD A NEW ORGANIZATION USER.



The screenshot shows the 'Users' page. The left sidebar has 'Users' selected. The main content area has a heading 'Users' and a breadcrumb 'Data Management Solutions / Users'. Below this is a message: 'The table below shows all of your organization's users currently in the system.' A red box highlights the 'ADD A NEW ORGANIZATION USER' button in the top right corner. Below the message is a table with columns: Username, First Name, Last Name, and Role.

Username	First Name	Last Name	Role

Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user.
Please note that the email address and username CAN NOT be changed once saved.

Add New Organization User

[Data Management Solutions](#) / [Users](#) / Add New Organization User

Complete the form below to add a new Organization User to the system.

New User

Billing Contact

☐ Billing Contact

Access Level

Organization Task Manager ▼

Organization

Data Management Solutions

Role

☒ ORGANIZATION_TASK_MANAGER

Whitelisted Companies

Select the companies that this user should have access to.

A Touch of Pink Bakery, ABC Company, ... ▼

SELECT ALL REMOVE ALL

In the Access Level dropdown, select the user type: Organization Task Manager. Organization Task Manager level has limited functionality. This level grants the same permissions as the Organization Comparer, excluding compare and merge functionality.

By default, this user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.

☒ ABC Testing

☒ Daphney Testing Company

☒ Dreamworks

☒ Hiram's Company

☒ Import Company

☒ Marvel Company

Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

The user will then receive an auto-generated email with a temporary password and a link to register their account.



Note: This user type does not count against your licensed user seats. You may create an unlimited number of Task Managers.

Adding an Organization Verifier user

Select USERS under the desired organization.

The screenshot shows the 'Data Management Solutions' dashboard. On the left sidebar, under the 'ORGANIZATION' section, the 'Users' option is highlighted with a red box. The main content area displays a welcome message and various organizational statistics.

Information	
Organization Name Data Management Solutions	Users Count 8
Total Companies Count 27	Active Companies Count 18
Inactive Companies Count 9	Active Yes
Plan Platinum Elite	Admin & Comparer Seats 10

Select ADD A NEW ORGANIZATION USER.

The screenshot shows the 'Users' page. The left sidebar has 'Users' selected. The main content area shows a heading 'Users' and a breadcrumb 'Data Management Solutions / Users'. Below this, a message states: 'The table below shows all of your organization's users currently in the system.' A red box highlights the 'ADD A NEW ORGANIZATION USER' button in the top right corner. Below the message is a table with columns: Username, First Name, Last Name, and Role.

Enter all applicable information for the newly created user and check the VERIFIER ACCESS ONLY box.

Add New Organization User

[Data Management Solutions](#) / [Users](#) / Add New Organization User

Complete the form below to add a new Organization User to the system.

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level

Organization Verifier Access Only

Organization

Data Management Solutions

Role

☒ ORGANIZATION_USER

SAVE

Whitelisted Companies

Select the companies that this user should have access to.

A Touch of Pink Bakery, ABC Company, ...

SELECT ALL REMOVE ALL

In the Access Level dropdown, select the user type: Organization Verifier Access Only. Organization Verifier Access level has partial functionality. This level is limited to verifying discrepancies and missing data for existing compares only. No compare and merge functionality exists for this level.

By default, a Verifier user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.

☒ ABC Testing
 ☒ Daphney Testing Company
 ☒ Dreamworks
 ☒ HiraK's Company
 ☒ Import Company
 ☒ Marvel Company

Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

The user will then receive an auto-generated email with a temporary password and a link to register their account.



Note: This user type does not count against your licensed user seats. You may create an unlimited number of Organization Verifiers.

Adding a Company Admin user

Select the Company where the new user will be added.

Data Management Solutions

Welcome, malanier2024!

Information

Organization Name
Data Management Solutions

Users Count
8

VIEW

Companies

ABC Company

A Touch of Pink Bakery

NEW

Click USERS under the desired company.

COMPANY

AT

A Touch of Pink Bakery

Comparisons

Mappings

Templates

Users

Carriers & Renewals

Convert Carrier Files

Click ADD A NEW COMPANY USER.

Users

A Touch of Pink Bakery / Users

The table below shows all of your company's users currently in the system.

ADD A NEW COMPANY USER

Enter all applicable information for the newly created user.

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level

Company Admin ▾

Company

A Touch of Pink Bakery

Role

☒ COMPANY_ADMIN

SAVE

In the Access Level dropdown, select the user type: Company Admin. This access level has full compare and merge functionality for the specific company that the user was created under.

Once all applicable information has been entered click Save.

The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding a Company Verifier user

Select the Company where the new user will be added.

Data Management Solutions

Welcome, malanier2024!

Information

Organization Name
Data Management Solutions

Users Count
8

[VIEW](#)

Companies

[NEW](#)

	ABC Company
	A Touch of Pink Bakery

Click USERS under the desired company.

COMPANY

AT

A Touch of Pink Bakery

- Comparisons
- Mappings
- Templates
- Users**
- Carriers & Renewals
- Convert Carrier Files

Click ADD A NEW COMPANY USER.

Users

[A Touch of Pink Bakery](#) / Users

The table below shows all of your company's users currently in the system.

[ADD A NEW COMPANY USER](#)

Enter all applicable information for the newly created user.

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level

Company Verifier Access Only ▾

Company

A Touch of Pink Bakery

Role

☒ COMPANY_USER

SAVE

Once all applicable information has been entered click Save. Whitelisted functionality is not available as the user is limited to the company they were created under.

The user will then receive an auto-generated email with a temporary password and a link to register their account.



Note: This user type does not count against your licensed user seats. You may create an unlimited number of Company Verifiers.

Resend User Registration

To resend a user registration invitation, locate the user in **Streamline** and click their username to open the **Edit User** screen. Then, click **Resend Invitation**.

The user will receive an automated email containing a temporary password and a link to complete their account registration.

dummyuser

Broker B: Data Management Solutions / Users / dummyuser

User Information

[EDIT](#)

Username dummyuser	Email dummyuser@testemail.net
First Name Dummy	Last Name User
Billing Contact No	Role Organization Admin
Organization Broker B: Data Management Solutions	User ID d72753df-754e-45f0-ac69-6fd0348d6ea2
Enabled Yes	User Status FORCE_CHANGE_PASSWORD
Created At 1/5/2026	Updated At 1/5/2026

This user is currently **enabled**.

[DISABLE](#)

This user has still not logged in with their temporary password. Click the button below to resend the invitation email.

[RESEND INVITATION](#)

Inactivating / Reactivating a User

Select USERS under the organization.

ORGANIZATION

DM

Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users**

COMPANY

Select a Company

Data Management Solutions

Welcome, malanier2024!

Information

[VIEW](#)

Organization Name Data Management Solutions	Users Count 8
Total Companies Count 27	Active Companies Count 18
Inactive Companies Count 9	Active Yes
Plan Platinum Elite	Admin & Comparer Seats 10

Notes

Select User to inactivate.

Users

[Data Management Solutions](#) / [Users](#)

The table below shows all of your organization's users currently in the system. [ADD A NEW ORGANIZATION USER](#)

Username ↓	First Name	Last Name	Role	Enabled
MALANIER2024	Mary	Lanier	Organization Admin	Yes
DUMMY5	Five	Dummy	Organization Admin	Yes

Click DISABLE in the user account. The button will change to ENABLE

User Information

[EDIT](#)

Username: demobroker1

Email: datamanagementsolutionsdvp@gmail.com

This user is currently **enabled**.

[DISABLE](#)

To reverse the inactivation, click ENABLE.

User Information

[EDIT](#)

Username: demobroker1

Email: datamanagementsolutionsdvp@gmail.com

This user is currently **disabled**.

[ENABLE](#)

Comparisons

All subscription plans include the **Streamline Data Solution**. This solution enables users to compare—or compare and merge—two Excel or CSV files, identifying discrepancies and missing records based on the fields selected during the audit process.

The Data Solution also includes a variety of audit reports, along with a **Comparison** table that displays all audits performed for each company within your organization. All reports can be downloaded for further review and analysis.

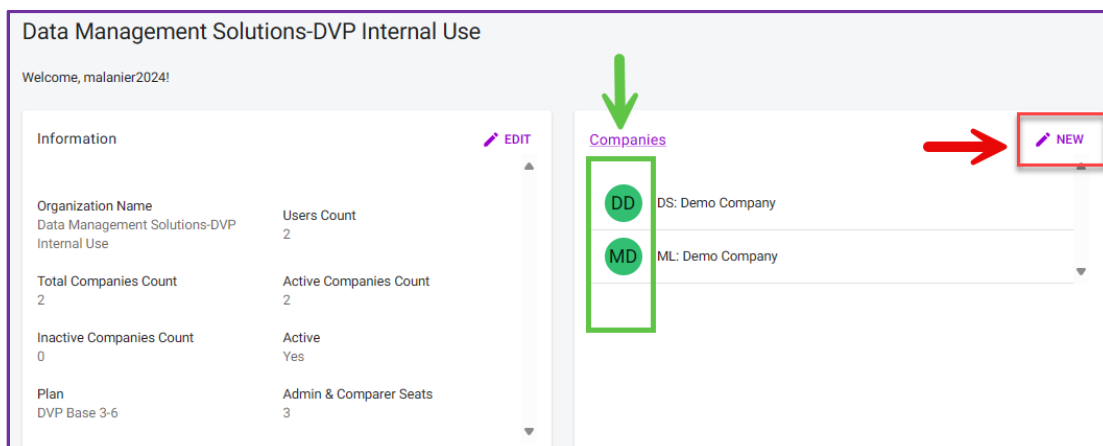
Note: The **Comparison** table export includes additional fields that are not displayed in the on-screen table but are available in the downloaded file.

Create the Compare Only

The compare process involves multiple steps, beginning with naming the compare and continuing through to its completion. Each step must be completed in sequence to move forward. Steps beyond **Step 5 – Compare** are optional and can be skipped if not applicable. With the exception of the initial compare creation, previously completed steps can be revisited and reset if needed.

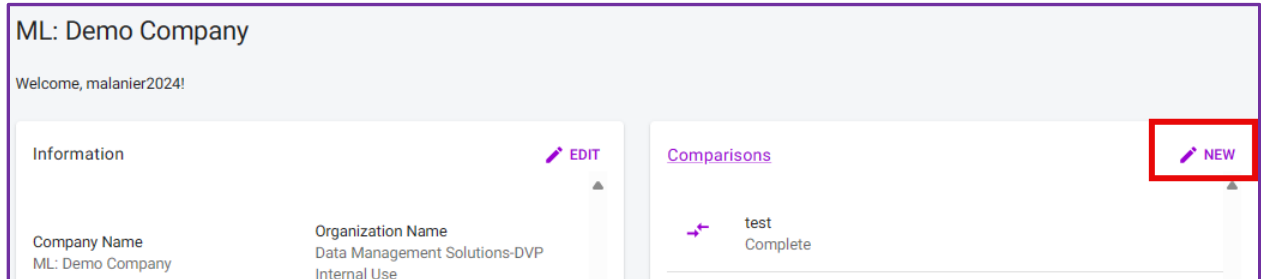
Select the Company

Select a Company or click NEW to create a new company.



Create New Compare

Select NEW to begin a new comparison



ML: Demo Company

Welcome, malanier2024!

Information EDIT

Company Name
ML: Demo Company

Organization Name
Data Management Solutions-DVP
Internal Use

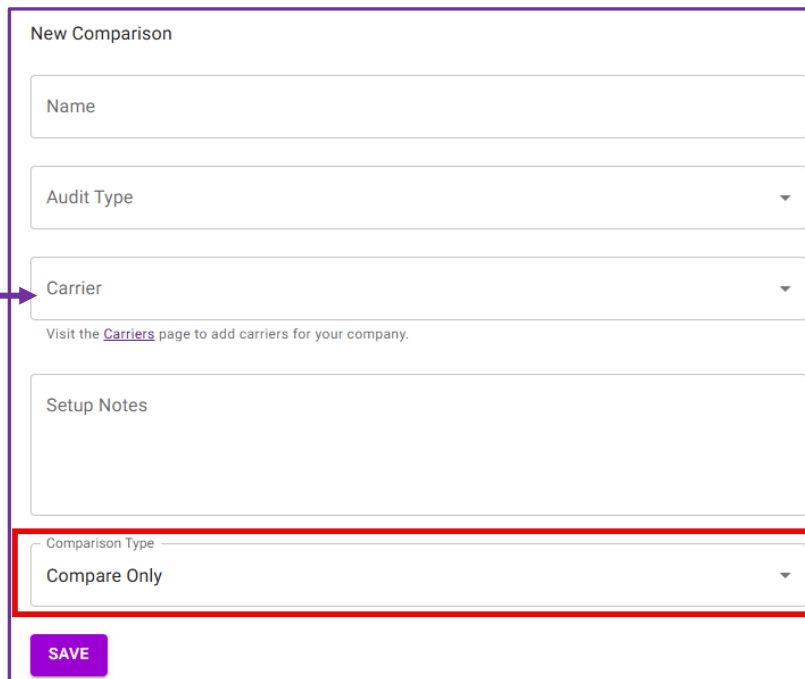
Comparisons NEW

test
Complete

Name the Compare

Enter the comparison name in the field provided. Select Audit Type from the dropdown and add Additional Notes if desired. Select Compare Only for the Comparison Type and click SAVE.

Please Note that once the comparison type is selected and saved, it cannot be changed.



New Comparison

Name

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type

Compare Only

SAVE

Carrier Selection is only available under the Platinum Elite or Subscription Based Audits plans.

Import Files

Import baseline and secondary files, select specific worksheets (if applicable), then click SAVE. If you use same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

The screenshot shows the 'Import Data' form with two columns for 'Baseline File' and 'Secondary File'. In the 'Baseline File' column, a red box highlights the 'Choose File' button and the file name 'Test Files for ...03.07.2024.xlsx'. A red dashed arrow points from this box to a green box around the 'Select Worksheet' dropdown, which is set to 'baseline'. A green dashed arrow points from the dropdown to a blue box around the 'Baseline File Name' field, which contains 'Base.xlsx'. In the 'Secondary File' column, a red box highlights the 'Choose File' button and the file name 'Test Files for ...03.07.2024.xlsx'. A red dashed arrow points from this box to a green box around the 'Select Worksheet' dropdown, which is set to 'secondary'. A green dashed arrow points from the dropdown to a blue box around the 'Secondary File Name' field, which contains 'Secondary.xlsx'. At the bottom of each column are 'BACK' and 'SAVE' buttons.

Select Data Points & Create Import Template

Streamline will automatically match data points that share the same name, as well as certain internally mapped keywords (e.g., DOB to Date of Birth). For any fields that are not matched, the corresponding data point can be selected from the dropdown in the Secondary column.

Data points, whether matched or not, can be removed by clicking the **X** to the right of the data point.

The option to use AI is available by selecting the **AI AUTO MATCH DATA POINTS** button. This will prompt the system to attempt to match any remaining data points. All AI-matched fields will display an AI icon beside the data point.

The screenshot shows the 'Select Data Points & Create Import Template' form. At the top, there is a text instruction: 'Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.' Below this is a dropdown menu labeled 'Apply a Data Points Template'. A red box highlights a section containing the text: 'Use Streamline AI to automatically match any remaining unmatched columns present in both files. AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.' Below this text is a purple button labeled 'AI AUTO-MATCH DATA POINTS'. At the bottom of the form, there are two dropdown menus: 'Member First Name' and 'First Name'. To the right of these is a checkbox labeled 'Unique Identifier'. To the right of the checkbox is a red box containing an 'AI' icon.

Please note that AI Auto Match is not 100% accurate. All matches should be reviewed to ensure accuracy.

At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

If a masked SSN is used as one of multiple unique identifiers, only the **last four digits** will be considered.

Note: When using a masked SSN, it is strongly recommended to include additional unique identifiers (UIs) such as first name, last name, date of birth, or relationship (if applicable) to ensure the most accurate results.

Optionally, check **SHARE WITH ORGANIZATION** to add the template to your Organization-Level Template Library. Templates shared by an Organization Admin or Organization Compare User can be accessed across all companies within the same organization.

Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

Once all desired data points and unique identifiers have been selected, the configuration can be saved for future use by entering a **Template Name** and clicking **SAVE**.

Select Data Points

Select the data points from each file to be included in the comparison. One or more data point pairs must be specified as the unique identifier for the record.
When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.

AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

AI AUTO-MATCH COMPLETE

base.xlsx
base ssn

second.xlsx
second ssn

SSN
Middle Name
Employment Status
Gender
Member First Name
Member Last Name
Birthdate
Medical Plan

SSN
Middle Name
Employment Status
Sex
First Name
Last Name
DOB
Health Coverage

☒ Unique Identifier
☐ Unique Identifier
☐ Unique Identifier
☐ Unique Identifier
☒ Unique Identifier
☒ Unique Identifier
☐ Unique Identifier
☐ Unique Identifier

AI

AI

AI

AI

CLEAR ALL

X
X
X
X
X
X
X
X

+ ADD DATA POINT

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name
Data Points Template

☐ Share with Organization

BACK

SAVE

Select Data Points & Reuse Existing Template

Select a relevant data points template from the dropdown menu. Templates will only appear if the data points align with the column names in the import file.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template
User Guide Data Points Template

If no template is available, you can create one by selecting the desired data points and unique identifier(s), then entering a template name. Once saved, the template will be added to your library for future use and can optionally be shared with the organization for use across other companies.



NOTE: When using a saved template, any changes made during the audit—such as adding or removing data points—are temporary and will not modify the existing template.

To preserve changes, create a new template by entering a new template name and clicking SAVE.

For example, in the scenario below, the auditor used the User Guide Data Points Template but removed the DOB data point. This modification is temporary and does not affect the original template. By saving with a new template name, a separate version is created without the DOB data point.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

User Guide Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.

AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

[+ AI AUTO-MATCH DATA POINTS](#)

base.xlsx
base ssn

second.xlsx
second ssn

[CLEAR ALL](#)

SSN	SSN	☒ Unique Identifier	X
Middle Name	Middle Name	☐ Unique Identifier	X
Employment Status	Employment Status	☐ Unique Identifier	X
Gender	Sex	☐ Unique Identifier	X
Member First Name	First Name	☒ Unique Identifier	X
Member Last Name	Last Name	☒ Unique Identifier	X
Medical Plan	Health Coverage	☐ Unique Identifier	X

[+ ADD DATA POINT](#)

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name

User Guide Data Points Template with NO DOB

☒ Share with Organization

[BACK](#)

[SAVE](#)

Mapping

Add customized mapping for data such as plans, tiers, or departments by utilizing the MAP buttons. Existing mappings for the company or created and shared at the Organization level can be re-used or new mappings can be created.

Mappings can be created several ways.

1. Manually create a mapping
2. Import a mapping
3. Copy and reuse an existing mapping

To Manually create a mapping:

To manually add a new mapping click NEW MAPPINGS. Add a mapping name and then enter the source value data as well as the target value by clicking ADD MAPPINGS. Multiple mapped values can be added.

Click SAVE MAPPINGS to newly created mapping to save.

Gender - Sex

Select Mappings or **NEW MAPPINGS**

Data Mappings name
Gender - Sex

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value	Target Value
Source F	Target Female
Source M	Target Male

+ ADD MAPPING

SAVE MAPPINGS

If you use existing mapping, click SELECT MAPPINGS.

Gender	Sex	MAP	none
Member First Name	First Name	MAP	
Member Last Name	Last Name	MAP	
Medical Plan	Medical	MAP	none
Monthly Cost	Monthly Plan Cost	MAP	none

Gender - Sex

Select Mappings Gender or **NEW MAPPINGS**

COPY MAPPINGS

Source Value	Target Value
Source Female	Target F
Source Male	Target M

SELECT MAPPINGS

[VIEW IN MAPPINGS LIBRARY](#)

Gender Sex **GENDER** none

To Import a mapping:

To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.

The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

After the data is imported, click **Save Mappings**. The mapping is now saved and ready to use.

Gender - Sex

Select Mappings or **NEW MAPPINGS**

Data Mappings name
Gender Import_01.05.2026

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value	Target Value
Source F	Target Female
Source M	Target Male
Source N	Target Non-binary

+ ADD MAPPING

SAVE MAPPINGS

To Copy and modify an existing mapping:

To reuse an existing mapping, search for it in the **Select Mappings** dropdown. Once selected, click **Copy Mappings**.

Medical Plan	Medical	MAP	none
Monthly Cost	Monthly Plan Cost	MAP	none

Medical Plan - Medical

Select Mappings or **NEW MAPPINGS**

2025 BCBS Plans

COPY MAPPINGS

Source Value	Target Value
Source Plan 1	Target HSA
Source Plan 2	Target PPO

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

When your changes are complete, click **Save Mappings**. The updated mapping is now saved and ready to use.

Medical Plan - Medical

Select Mappings
2025 BCBS Plans or NEW MAPPINGS

Data Mappings name
2025 BCBS Plans (Copy)

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value	Target Value
Source Plan 1	Target HSA
Source Plan 2	Target PPO
Source Plan 3	Target Limited

+ ADD MAPPING

SAVE MAPPINGS



NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.

Data Mappings name
Deduction Code

Source Value	Target Value
Source STD	Target STD 14 day
Source STD	Target STD 30 day

Data Mappings name
Deduction Code

Source Value	Target Value
Source STD 14 day	Target STD
Source STD 30 day	Target STD

Mapping – Date Format

If the date is not formatted in the files as a date or a different formatting type, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.

Data Points			Date Format	Computation Function
'Base'	'Secondary'	Data Mappings		
DOB	DOB	MAP	none	DOB - DOB
Employment Status	Employment Status	EMPLOYMENT STATUS	NONE	

If one of the file's cells are not formatted as a "Date" in Excel, select the format below and the system will attempt to convert it to a date during the comparison. For unsupported date formats, you may need to re-import your file after converting the cells to a date format.

Format:

SAVE DATE FORMAT

Mapping – Computation

Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function required.

Computation Function

NONE

NONE

NONE

If both files contain a numeric value, and there is a discrepancy between the two values, the system will attempt to run the selected computation function on the values. If successful, the resulting discrepancy computation value will be included on the the Discrepancy Reports.

Format:

NONE

MINUS: BASELINE - SECONDARY

MINUS: SECONDARY - BASELINE

ADD

MULTIPLY

DIVIDE: BASELINE / SECONDARY

DIVIDE: SECONDARY / BASELINE

An optional rounding variance can also be applied to the **Minus** computation. When used, any difference between the baseline and secondary values that falls within the selected range will not be flagged as a discrepancy. This option is typically used when a known or acceptable variance is expected.

Monthly Cost
Monthly Plan Cost
MAP
none

Monthly Cost - Monthly Plan Cost
X

If both files contain a numeric value, and there is a discrepancy between the two values, the system will attempt to run the selected computation function on the values. If successful, the resulting discrepancy computation value will be included on the the Discrepancy Reports.

Format

MINUS: BASELINE - SECONDARY

Optional: If the absolute difference is within the rounding range, it will not be flagged as a discrepancy.

Rounding Range

0.03

SAVE COMPUTATION FUNCTION

The computation function generates a new column in the downloadable Discrepancy Report based on the calculated results, and these results are included in both the discrepancy counts and discrepancy report tables.

Comparison Details

Discrepancy Counts by Data Point

'Base'	'Secondary'	Computation Function	Count
First Name	First Name		1
Employment Status	Employment Status		1
Monthly Premium	Monthly Premium	minus: baseline - secondary	4

Missing Counts

No missing records found!

Discrepancy Report

First name	Last name	Relationship	Unique Identifier	'Base' row / data point	'Secondary' row / data point	'Base' value	'Secondary' value	Computation Function Result
Katherine	Aldridge		217219160_****9160	4 / Monthly Premium	4 / Monthly Premium	654.98	259.55	395.43



Note: This functionality applies **only to numeric fields**, and **only to data points that are *not* part of the unique identifier**.

Only results from the **subtraction (minus)** function will proceed through the full compare process. All other functions will stop at **Step 5**.

Compare

Verify selected information and click COMPARE. Comparison Name, Carrier (if applicable), Audit Type, Setup Notes, and Auditor Memo can be edited. [Please note that the Auditor Memo is automatically included in the email to the Verifier.](#)

Compare

Please review the details of this comparison below.

Comparison Name Demo	EDIT	Audit Type	EDIT
Carrier	EDIT	Setup Notes	EDIT
Assigned Verifier Unassigned	EDIT	Auditor Memo	EDIT
Created By / Auditor maryl		Verifier Memo	
Current Step Compare		Baseline File base.xlsx	
Baseline Worksheet baseline		Secondary File second.xlsx	
Secondary Worksheet secondary		Comparison Type Compare Only	
Unique Identifiers ('base' - 'second') First Name - First Name Last Name - Last Name Employee SSN - Social Security Number		Data Points ('base' - 'second') Middle Name - Middle Name DOB - Date of Birth {date format:'MM/dd/yyyy'} Monthly Premium - Monthly Premium Gender - Gender	
Data Point Mappings ('base' - 'second' -> Mapping Name) Gender - Gender -> Gender		Mappings (Source - Target) Gender F - Female M - Male	

BACK
COMPARE

Compare is complete. Comparison results are available for view and for download by clicking the SELECT FILE TO DOWNLOAD. The original files can also be accessed from the dropdown as well as another discrepancy report where all data points are included for the row where a discrepancy was identified. If Verification is not needed, Compare can be closed by clicking OVERRIDE AS COMPLETE.



QUICK TIP

The **Request Support** option provides quick and easy access to assistance when an audit produces a high volume of results. It allows users to flag the audit for additional review and support, helping teams stay focused and ensuring issues are addressed efficiently.

The **Request Support** button is available only on the Compare screen and can be selected once per audit. If another support request is needed for the same comparison, the audit must be reset to a previous step. If the audit still contains more than 30 discrepancies and/or missing items after reset, the **Request Support** option will become available again.

View Reports

The comparison process has finished. You can download the discrepancy reports and original files below, or proceed to verify any discrepancies.

Select file to download

Comparison Details

Discrepancy Counts by Data Point

'Ease'	' Standard invoice'	Computation Function	Count
Total Rate	Total Cost	minus: baseline - secondary	33

Missing Counts

Missing from 'Ease'	Missing from ' Standard invoice'
48	3

Need Help?

If you need assistance with this audit please click on the button below to request support from our team. A member of our team will reach out to you within 1 business day. For immediate assistance, email support@dms-datavalidate.com.

REQUEST SUPPORT

Verify Discrepancies

Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. A discrepancy type can also be selected from the dropdown. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Note in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

First name	Last name	Relationship	'base' row / data point	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	☐ 654.98 ☐ 259.55 ☐ Overwrite ☐ Ignore	--	Discrepancy Type Auditor notes Premium not the same in carrier as the Ben Admin system. Verifier notes 	

If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ▼

First name	Last name	Relationship	'base' row / data point	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	☐ 654.98 ☐ 259.55 ☐ Overwrite ☒ Ignore ^	--	Discrepancy Type Auditor notes Verifier notes 	

↓

Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	Ignore ▼
-----------	----------	---------------------	---------------------	----------

You can now use the **Apply To All On This Data Point** feature to update matching data points. When selected, the chosen discrepancy type and any auditor notes will automatically be applied to all occurrences of the same data point. Please note that the **Apply To All** will overwrite any existing discrepancy types or notes for those matching occurrences. **This feature is available only in Step 6: Verify Discrepancies.**

In the example below, the Apply To All feature is used on the Employment Status data point. As a result, the Discrepancy Type of Other and the Auditor Note, "Employment Status does not match," will be applied to every Employment Status data point in the comparison.

The screenshot shows a comparison interface with two columns: 'Allen' and 'Central'. Under 'Allen' is '25 / Employment Status' and under 'Central' is '24 / Employment Status'. To the right are radio buttons for 'Active', 'Terminated', and 'Ignore', and an 'Overwrite' button. On the far right, there are three sections: 'Discrepancy Type' with a dropdown set to 'Other', 'Auditor notes' with the text 'Employment Status does not match', and 'Verifier notes' which is empty. At the bottom right, a red box highlights the 'APPLY TO ALL ON THIS DATA POINT' button.

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. [The Verifier Memo is automatically included in the email back to the Auditor.](#)

The screenshot shows a 'Verify Missing' interface. At the top, it says 'Rows per page: 5' and '1-2 of 2'. Below this is a 'Verifier Memo' dropdown menu. To the left of the dropdown are buttons for 'BACK', 'NEXT', and 'OVERRIDE AS COMPLETE'. Below the dropdown is a large text area for the 'Verifier Memo'. A red dashed arrow points from the dropdown to the text area. At the bottom of the text area, a small note reads: 'General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.'

Verify Missing

Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to

select/deselect all entries. If INCLUDE is selected, the entry will be included in the export files. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Notes in the Auditor Notes field, and a specific discrepancy type can be selected in the Discrepancy Type dropdown. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the missing discrepancies below by selecting whether or not the missing records should be included or excluded in the verified output files. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details

First name	Last name	Relationship	Unique Identifier	'base' row	'second' row	Duplicate unique identifier row	Verified Inclusion	Last Verified By	Discrepancy Type / Notes
Julia	Benefits		julia_benefits_1234	13			INCLUDE ALL EXCLUDE ALL		Discrepancy Type Auditor notes Verifier notes

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. [The Verifier Memo is automatically included in the email back to the Auditor.](#)

Rows per page: 5 1-2 of 2 < >

Verifier Memo

BACK NEXT OVERRIDE AS COMPLETE

Verifier Memo

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

Assign a Verifier to the Compare

A verifier can be assigned to complete the comparison. To assign a verifier, select the Verifier Details dropdown. In the Verifier Details section, select the EDIT option for Assigned Verifier.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details

Assigned Verifier

Unassigned

EDIT

Auditor Memo

EDIT

Setup Notes

Carrier

Audit Type

Created By / Auditor

maryl

Comparison Type

Compare + Merge

This will open up the comparison edit section. In the Assigned Verifier dropdown, select an applicable user. **An audit can be assigned to anyone who has access to the specific company and only to users with the same level access. For example, a Company Admin user can only assign an audit to other Company Admins or Company Verifiers within the same company. An Org Level user can assign to other users within the same organization and all company level users.**

A notification email containing Auditor name, Organization/Company Name, Audit Name, and a link to the specific audit is generated once a verifier has been assigned.

Hello {Verifier First Name},

{Auditor First Name and Last Name} at {Organization Name if Org Level or Company Name if Company Level User} has finished auditing your data and has designated you as the verifier for this comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

Edit Comparison

Comparison Name
Demo for User Guides

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type
Compare Only

Created By / Auditor
maryl

Auditor Memo

General purpose auditor notes that will be communicated to the verifier (assigned below) via automated email.

Assigned Verifier

Verifier Memo

Unassigned
companyverifier-dms
demobroker1
malanier2024

General purpose notes available to the email.

SAVE

The notification email can be sent from either the Verify Discrepancy Step or the Verify Missing Data step.

A notification email can be resent if the audit has not reached the completion step (Step 8). To resend the notification email, navigate to the Verifier Details and click EDIT for the Assigned Verifier. Click RESEND to resend the notification email to the currently assigned verifier.

Complete the form below to update this comparison's information.

Edit Comparison

Comparison Name

Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Resend the notification email to the assigned verifier.

RESEND

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

Hello {Auditor First Name},

This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the audit process.

{Verifier Memo}

Thank you,

On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The verified baseline and secondary files can be downloaded with all records including verified or verified records only by utilizing dropdown. If a discrepancy was ignored, the record **will not be included** in the Verified records only download. The ignored record will continue to show in the All records including verified download.

Complete

All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.

Comparison Details

Select file to export

BACK

GO TO ALL COMPARISONS

-- Select --

Base

Secondary

Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Keys Words page.

Select file to export
Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

Original Name	Rename To	Format Values
Employee SSN		
Social Security Number		
First Name		
Middle Name		
Last Name		
Display Name		
DOB		
Employment Status		
Testing Scenario		
Monthly Premium		

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

☐ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED
EXPORT VERIFIED RECORDS ONLY

BACK
GO TO ALL COMPARISONS

Column names can also be reordered by dragging and dropping data point in desired location.

Middle Name

DOB

Last Name

Click SAVE CUSTOMIZATIONS if desired. Customization is also automatically saved when the export files (All Records Including Verified and Verified Records Only) are downloaded.

SAVE CUSTOMIZATIONS

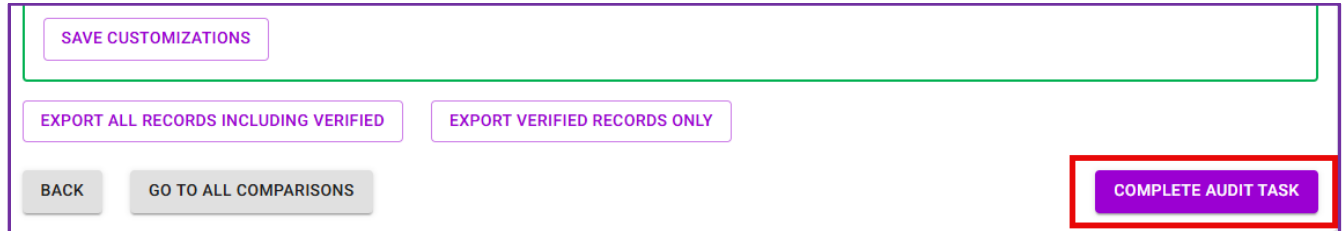
EXPORT ALL RECORDS INCLUDING VERIFIED
EXPORT VERIFIED RECORDS ONLY

BACK
GO TO ALL COMPARISONS

COMPLETE AUDIT TASK

If an audit was created through an **Audit Task**, Agency users can close the task directly from within the audit by selecting **COMPLETE AUDIT TASK**.

This reduces the need to navigate back to the Audit Task, streamlining the workflow.



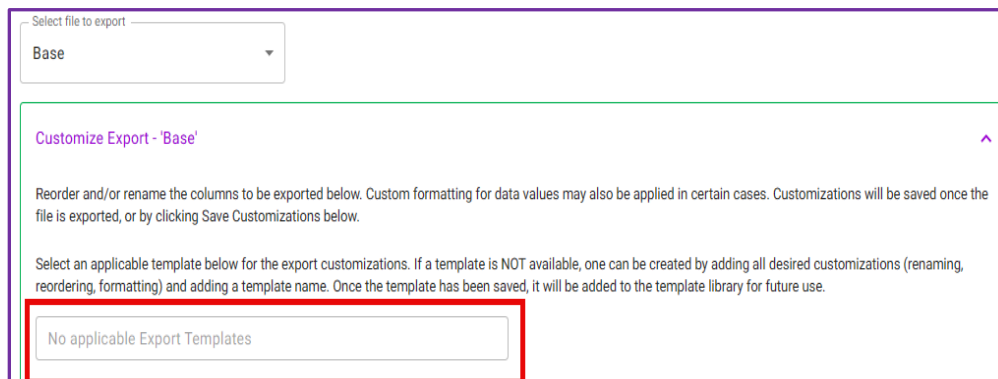
The screenshot shows a user interface for an audit task. At the top, there is a button labeled 'SAVE CUSTOMIZATIONS'. Below it, there are two buttons: 'EXPORT ALL RECORDS INCLUDING VERIFIED' and 'EXPORT VERIFIED RECORDS ONLY'. At the bottom left, there are two buttons: 'BACK' and 'GO TO ALL COMPARISONS'. At the bottom right, there is a button labeled 'COMPLETE AUDIT TASK' which is highlighted with a red rectangular box.

Export Template

Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming and saving the template. Once the template has been saved, it will be added to the template library for future use.

Optionally, check SHARE WITH ORGANIZATION to add the template to the Organization Level Template library. **Any template shared with an organization and created by an organization administrator, or an organization compare user, can be utilized under any company within that specific organization. Company admins and company compare users which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.**

Selecting export template:



The screenshot shows a 'Customize Export' interface. At the top, there is a dropdown menu labeled 'Select file to export' with 'Base' selected. Below the dropdown, there is a section titled 'Customize Export - 'Base'' with a small upward arrow icon. Inside this section, there is a paragraph of text: 'Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.' Below this text, there is another paragraph: 'Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.' At the bottom of this section, there is a text box containing the message 'No applicable Export Templates', which is highlighted with a red rectangular box.

Saving New Export Template:

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Export Template

☒ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

GO TO ALL COMPARISONS

COMPLETE AUDIT TASK

The data comparison and verification processes are complete. To see other comparisons or to begin a new, click GO TO ALL COMPARISONS.

Questions: Contact Support@dms-datavalidate.com

Create the Compare and Merge

The compare process consists of several steps from naming the compare up to the completion of the comparison. Each step must be completed to advance through the compare process. All steps beyond Step 5 - Compare can be ignored if not needed. Prior completed steps with the exclusion of the compare creation can be revisited and reset if desired.

Select the Company

Select Company or click NEW to create a new company.

Data Management Solutions-DVP Internal Use

Welcome, malanier2024!

Information EDIT

Organization Name Data Management Solutions-DVP Internal Use	Users Count 2
Total Companies Count 2	Active Companies Count 2
Inactive Companies Count 0	Active Yes
Plan DVP Base 3-6	Admin & Comparer Seats 3

Companies

- DD: Demo Company
- ML: Demo Company

NEW

Create New Compare

Select NEW to begin a new comparison

ML: Demo Company

Welcome, malanier2024!

Information EDIT

Company Name ML: Demo Company	Organization Name Data Management Solutions-DVP Internal Use
----------------------------------	---

Comparisons NEW

- test Complete

Name the Compare

Enter the comparison name in the field provided. Select Audit Type from the dropdown and add Additional Notes if desired. Select Compare & Merge for the Comparison Type and click SAVE.

Please Note that once the comparison type is selected and saved, it cannot be changed.

New Comparison

Name
Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type
Compare & Merge

SAVE

Carrier Selection is only available under the Platinum Elite or Subscription Based Audits plans

Import Files

Import baseline and secondary files, select specific worksheets (if applicable), then click SAVE. If using same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

Import Data

Select the files to be used for comparison.

Baseline File

Choose File Test Files for ...03.07.2024.xlsx

Select Worksheet
baseline

Baseline File Name
Base .xlsx

Secondary File

Choose File Test Files for ...03.07.2024.xlsx

USE BASELINE FILE

Select Worksheet
secondary

Secondary File Name
Secondary .xlsx

BACK

SAVE

Select Data Points & Create Import Template

Streamline will automatically match data points that share the same name, as well as certain internally mapped keywords (e.g., DOB to Date of Birth). For any fields that are not matched, the corresponding data point can be selected from the dropdown in the Secondary column.

Data points, whether matched or not, can be removed by clicking the **X** to the right of the data point.

The option to use AI is available by selecting the **AI AUTO MATCH DATA POINTS** button. This will prompt the system to attempt to match any remaining data points. All AI-matched fields will display an AI icon beside the data point.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.
AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

AI AUTO-MATCH DATA POINTS

Member First Name First Name ☐ Unique Identifier 

Please note that AI Auto Match is not 100% accurate. All matches should be reviewed to ensure accuracy.

To Merge a data point without comparing, select [merge] in the corresponding dropdown

Data Point Date of Hire ☐ Unique Identifier X

+ ADD DATA POINT

[merge] Employee SSN Social Security Number First Name

At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

If a masked SSN is used as one of multiple unique identifiers, only the **last four digits** will be considered.

Note: When using a masked SSN, it is strongly recommended to include additional unique identifiers (UIs) such as first name, last name, date of birth, or relationship (if applicable) to ensure the most accurate results.

Optionally, check **SHARE WITH ORGANIZATION** to add the template to your Organization-Level Template Library. Templates shared by an Organization Admin or Organization Compare User can be accessed across all companies within the same organization.

Company Admins (available under the Platinum Elite subscription) will only have access to templates created within their specific company.

Once all desired data points and unique identifiers have been selected, the configuration can be saved for future use by entering a **Template Name** and clicking **SAVE**.

Select Data Points

Select the data points from each file to be included in the comparison. One or more data point pairs must be specified as the unique identifier for the record.

When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

To merge a field from one file into the other, select the [merge] option for that field.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

User Guide Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.

AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

[AI AUTO-MATCH DATA POINTS](#)

base.xlsx
base ssn

second.xlsx
second ssn

SSN

SSN

☒ Unique Identifier

X

Gender

Sex

☐ Unique Identifier

X

Member First Name

First Name

☒ Unique Identifier

X

Member Last Name

Last Name

☒ Unique Identifier

X

Birthdate

DOB

☐ Unique Identifier

X

Medical Plan

Health Coverage

☐ Unique Identifier

X

Middle Name

[merge]

☐ Unique Identifier

X

[merge]

Employment Status

☐ Unique Identifier

X

[CLEAR ALL](#)

[+ ADD DATA POINT](#)

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name

☐ Share with Organization

[BACK](#)

[SAVE](#)

Select Data Points & Reuse Existing Template

Select an applicable data points template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the import file column names. If a template is NOT available, one can be created by

selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use and can optionally be shared with the organization for reuse under other companies.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

User Guide Data Points Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files



NOTE: When using a saved template, any changes made during the audit—such as adding or removing data points—are temporary and will not modify the existing template.

To preserve changes, create a new template by entering a new template name and clicking SAVE.

For example, in the scenario below, the auditor used the Demo Import Template but removed the DOB data point. This modification is temporary and does not affect the original template. By saving with a new template name, a separate version is created without the DOB data point.

Select Data Points

Select the data points from each file to be included in the comparison. One or more data point pairs must be specified as the unique identifier for the record.

When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

Demo Import Template

Use Streamline AI to automatically match any remaining unmatched columns present in both files.

AI Auto-Match is not 100% accurate. Please review all matches to ensure they are correct.

AI AUTO-MATCH DATA POINTS

base.xlsx
baseline

second.xlsx
secondary

CLEAR ALL

Social Security Number	Social Security Number	☒ Unique Identifier	X
Employee SSN	Employee SSN	☒ Unique Identifier	X
First Name	First Name	☐ Unique Identifier	X
Middle Name	Middle Name	☐ Unique Identifier	X
Last Name	Last Name	☐ Unique Identifier	X
Employment Status	Employment Status	☐ Unique Identifier	X
Monthly Premium	Monthly Premium	☐ Unique Identifier	X

+ ADD DATA POINT

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name

Demo Import Template with No DOB

☒ Share with Organization

BACK

SAVE

Mapping

Add customized mapping for data such as plans, tiers, or departments by utilizing the MAP buttons. Existing mappings for the company or created and shared at the Organization level can be re-used or new mappings can be created.

Mappings can be created several ways.

1. Manually create a mapping
2. Import a mapping
3. Copy and reuse an existing mapping

To Manually create a mapping:

To manually add a new mapping click NEW MAPPINGS. Add a mapping name and then enter the source value data as well as the target value by clicking ADD MAPPINGS. Multiple mapped values can be added.

Click SAVE MAPPINGS to newly created mapping to save.

Gender - Sex

Select Mappings or NEW MAPPINGS

Data Mappings name
Gender - Sex

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value	Target Value
Source: F	Target: Female
Source: M	Target: Male

+ ADD MAPPING

SAVE MAPPINGS

If you use existing mapping, click SELECT MAPPINGS.

Gender	Sex	MAP	none
Member First Name	First Name	MAP	
Member Last Name	Last Name	MAP	
Medical Plan	Medical	MAP	none
Monthly Cost	Monthly Plan Cost	MAP	none

Gender - Sex

Select Mappings Gender or NEW MAPPINGS

COPY MAPPINGS

Source Value	Target Value
Source: Female	Target: F
Source: Male	Target: M

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

Gender Sex GENDER none

To Import a mapping:

To add a new mapping, click **New Mappings**. Enter a mapping name, then select **Import**.

The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping **must** be on the first tab—otherwise, the import will fail.

After the data is imported, click **Save Mappings**. The mapping is now saved and ready to use.

Gender - Sex

Select Mappings or **NEW MAPPINGS**

Data Mappings name
Gender Import_01.05.2026

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value	Target Value
Source F	Target Female
Source M	Target Male
Source N	Target Non-binary

+ ADD MAPPING

SAVE MAPPINGS

To Copy and modify an existing mapping:

To reuse an existing mapping, search for it in the **Select Mappings** dropdown. Once selected, click **Copy Mappings**.

Medical Plan	Medical	MAP	none
Monthly Cost	Monthly Plan Cost	MAP	none

Medical Plan - Medical

Select Mappings or **NEW MAPPINGS**

2025 BCBS Plans

COPY MAPPINGS

Source Value	Target Value
Source Plan 1	Target HSA
Source Plan 2	Target PPO

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

This creates a duplicate of the mapping with **(copy)** added to the name. You can then rename the mapping and add, update, or remove any source or target values as needed.

When your changes are complete, click **Save Mappings**. The updated mapping is now saved and ready to use.

Medical Plan - Medical

Select Mappings
2025 BCBS Plans
or
NEW MAPPINGS

Data Mappings name
2025 BCBS Plans (Copy)

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value	Target Value
Source Plan 1	Target HSA
Source Plan 2	Target PPO
Source Plan 3	Target Limited

+ ADD MAPPING

SAVE MAPPINGS



NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.

Data Mappings name
Deduction Code

Source Value	Target Value
Source STD	Target STD 14 day
Source STD	Target STD 30 day

Data Mappings name
Deduction Code

Source Value	Target Value
Source STD 14 day	Target STD
Source STD 30 day	Target STD

Mapping – Date Format

If the date is not formatted in the files as a date or a different formatting type, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.

Data Points	'Base'	'Secondary'	Data Mappings	Date Format	Computation Function
DOB	DOB	MAP	none	DOB - DOB	X
Employment Status	Employment Status	EMPLOYMENT STATUS	NONE		

If one of the file's cells are not formatted as a "Date" in Excel, select the format below and the system will attempt to convert it to a date during the comparison. For unsupported date formats, you may need to re-import your file after converting the cells to a date format.

Format:

Mapping – Computation

Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function required.

Computation Function
NONE
NONE
NONE

If both files contain a numeric value, and there is a discrepancy between the two values, the system will attempt to run the selected computation function on the values. If successful, the resulting discrepancy computation value will be included on the the Discrepancy Reports.

Format:

MINUS: BASELINE - SECONDARY

MINUS: SECONDARY - BASELINE

ADD

MULTIPLY

DIVIDE: BASELINE / SECONDARY

DIVIDE: SECONDARY / BASELINE

The computation function will create a new column as a result of the computation in the downloadable Discrepancy Report and will be reflected in the discrepancy counts and discrepancy report tables.

Please note that this functionality will **ONLY** apply to numeric fields and then **ONLY** to data points that have **NOT** been selected as part of the unique identifier.

Only the subtraction (minus) results will continue through the remainder of the compare process. All other functions will end at Step 5.

Discrepancy Counts by Data Point

'Base'	'Secondary'	Computation Function	Count
DOB	DOB		1
Monthly Premium	Monthly Premium	minus: baseline - secondary	4

Missing Counts

Missing from 'Base'	Missing from 'Secondary'
1	2

Discrepancy Report

First name	Last name	Relationship	Unique Identifier	'Base' row / data point	'Secondary' row / data point	'Base' value	'Secondary' value	Computation Function Result
Katherine	Aldridge		217219160_katherine_aldrige	4 / Monthly Premium	4 / Monthly Premium	654.98	259.55	395.43

Compare

Verify selected information and click COMPARE. Comparison Name, Carrier (if applicable), Audit Type, Setup Notes, and Auditor Memo can be edited. [The Auditor Memo is automatically included in the email to the Verifier.](#)

Compare

Please review the details of this comparison below.

Comparison Name

Demo - Compare and Merge

EDIT

Audit Type

EDIT

Carrier

EDIT

Setup Notes

EDIT

Assigned Verifier

Unassigned

EDIT

Auditor Memo

EDIT

Created By / Auditor

maryl

Verifier Memo

Current Step

Compare

Baseline File

base.xlsx

Baseline Worksheet

baseline

Secondary File

second.xlsx

Secondary Worksheet

secondary

Comparison Type

Compare + Merge

Unique Identifiers ('base' - 'second')

Employee SSN - Employee SSN

First Name - First Name

Last Name - Last Name

Data Points ('base' - 'second')

DOB - DOB (date format:'MM/dd/yyyy')

Monthly Premium - Monthly Premium

Gender - [merge]

[merge] - Date of Hire (date format:'MM/dd/yyyy')

BACK

COMPARE

Compare is complete. Comparison results are available for view and for download by clicking the SELECT FILE TO DOWNLOAD. The original files can also be accessed from the dropdown as well as another discrepancy report where all data points are included for the row where a discrepancy was identified. If Verification is not needed, Compare can be closed by clicking OVERRIDE AS COMPLETE.



QUICK TIP

The **Request Support** option provides quick and easy access to assistance when an audit produces a high volume of results. It allows users to flag the audit for additional review and support, helping teams stay focused and ensuring issues are addressed efficiently.

The **Request Support** button is available only on the Compare screen and can be selected once per audit. If another support request is needed for the same comparison, the audit must be reset to a previous step. If the audit still contains more than 30 discrepancies and/or missing items after reset, the **Request Support** option will become available again.

View Reports

The comparison process has finished. You can download the discrepancy reports and original files below, or proceed to verify any discrepancies.

Select file to download

Comparison Details

Discrepancy Counts by Data Point

'Ease'	' Standard invoice'	Computation Function	Count
Total Rate	Total Cost	minus: baseline - secondary	33

Missing Counts

Missing from 'Ease'	Missing from ' Standard invoice'
48	3

Need Help?

If you need assistance with this audit please click on the button below to request support from our team. A member of our team will reach out to you within 1 business day. For immediate assistance, email support@dms-datavalidate.com.

REQUEST SUPPORT

Verify Discrepancies

Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. A discrepancy type can also be selected from the dropdown. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Note in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details

First name	Last name	Relationship	'base' row / data point	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	☐ 654.98 ☐ 259.55 ☐ Overwrite ☐ Ignore	--		Discrepancy Type Auditor notes Premium not the same in carrier as the Ben Admin system. Verifier notes

If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details

First name	Last name	Relationship	'base' row / data point	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	☐ 654.98 ☐ 259.55 ☐ Overwrite ☒ Ignore	--		Discrepancy Type Auditor notes Verifier notes

KatherineAldridge4 / Monthly Premium4 / Monthly PremiumIgnore

You can now use the **Apply To All On This Data Point** feature to update matching data points. When selected, the chosen discrepancy type and any auditor notes will automatically be applied to all occurrences of the same data point. Please note that the **Apply To All** will overwrite any existing discrepancy types or notes for those matching occurrences. **This feature is available only in Step 6: Verify Discrepancies.**

In the example below, the **Apply To All** feature is used on the Employment Status data point. As a result, the Discrepancy Type of Other and the Auditor Note, *"Employment Status does not match,"* will be applied to every Employment Status data point in the comparison.

Allen	Central	25 / Employment Status	24 / Employment Status	☐ Active ☐ Terminated ☐ Overwrite ☐ Ignore	--
-------	---------	------------------------------	------------------------------	---	----

Discrepancy Type
 Other

Auditor notes
 Employment Status does not match.

Verifier notes

APPLY TO ALL ON THIS DATA POINT

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. [The Verifier Memo is automatically included in the email back to the Auditor.](#)

Rows per page: 5 1-2 of 2 < >

Verifier Memo

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

Verify Missing

Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to select/deselect all entries. If INCLUDE is selected, the entry will be included in the export files. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Notes in the Auditor Notes field, and a specific discrepancy type can be selected in the Discrepancy Type dropdown. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the missing discrepancies below by selecting whether or not the missing records should be included or excluded in the verified output files. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details

First name	Last name	Relationship	Unique Identifier	'base' row	'second' row	Duplicate unique identifier row	Verified Inclusion	Last Verified By	Discrepancy Type / Notes
Julia	Benefits		julia_benefits_1234	13			INCLUDE ALL EXCLUDE ALL		Discrepancy Type Auditor notes Verifier notes

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. [The Verifier Memo is automatically included in the email back to the Auditor.](#)

Rows per page: 5 1-2 of 2 < >

Verifier Memo

BACK

NEXT

Override as Complete

Verifier Memo

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

Assign a Verifier to the Compare

A verifier can be assigned to complete the comparison. To assign a verifier, select the Verifier Details dropdown. In the Verifier Details section, select the EDIT option for Assigned Verifier.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details

Assigned Verifier

Unassigned

EDIT

Auditor Memo

EDIT

Setup Notes

Carrier

Audit Type

Created By / Auditor

maryl

Comparison Type

Compare + Merge

This will open up the comparison edit section. In the Assigned Verifier dropdown, select an applicable user. **An audit can be assigned to anyone who has access to the specific company and only to users with the same level access. For example, a Company Admin user can only assign an audit to other Company Admins or Company Verifiers within the same company. An Org Level user can assign to other users within the same organization and all company level users.**

A notification email containing Auditor name, Organization/Company Name, Audit Name, and a link to the specific audit is generated once a verifier has been assigned.

Hello {Verifier First Name},

{Auditor First Name and Last Name} at {Organization Name if Org Level or Company Name if Company Level User} has finished auditing your data and has designated you as the verifier for this comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

Edit Comparison

Comparison Name
Demo for User Guides

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type
Compare Only

Created By / Auditor
maryl

Auditor Memo

General purpose auditor notes that will be communicated to the verifier (assigned below) via automated email.

Assigned Verifier

Verifier Memo

Unassigned
companyverifier-dms
demobroker1
malanier2024

General purpose notes available to the email.

SAVE

The notification email can be sent from either the Verify Discrepancy Step or the Verify Missing Data step.

A notification email can be resent if the audit has not reached the completion step (Step 8). To resend the notification email. Navigate to the Verifier Details and click EDIT for the Assigned Verifier. Click RESEND to resend the notification email to the currently assigned verifier.

Complete the form below to update this comparison's information.

Edit Comparison

Comparison Name

Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Resend the notification email to the assigned verifier.

RESEND

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

Hello {Auditor First Name},

This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.

Please [click here](#) below to log in and complete the audit process.

{Verifier Memo}

Thank you,

On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The verified baseline and secondary files can be downloaded with all records including verified or verified records only by utilizing dropdown. If a discrepancy was ignored, the record **will not be included** in the Verified records only download. The ignored record will continue to show in the All records including verified download.

Complete

All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.

Comparison Details

Select file to export

BACK

GO TO ALL COMPARISONS

-- Select --

Base

Secondary

Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Key Words page.

Select file to export
Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

Original Name	Rename To	Format Values	Merged
Employee SSN			
First Name			
Last Name			
DOB			
Gender			
Monthly Premium			
Date of Hire			

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

☐ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED
EXPORT VERIFIED RECORDS ONLY

BACK
GO TO ALL COMPARISONS

Column names can also be reordered by dragging and dropping data point in desired location.

Middle Name

DOB

Last Name

Click SAVE CUSTOMIZATIONS if desired. Customization is also automatically saved when the export files (All Records Including Verified and Verified Records Only) are downloaded.

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

GO TO ALL COMPARISONS

COMPLETE AUDIT TASK

If an audit was created through an **Audit Task**, Agency users can close the task directly from within the audit by selecting **COMPLETE AUDIT TASK**.

This reduces the need to navigate back to the Audit Task, streamlining the workflow.

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

GO TO ALL COMPARISONS

COMPLETE AUDIT TASK

Export Template

Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming and saving the template. Once the template has been saved, it will be added to the template library for future use.

Optionally, check SHARE WITH ORGANIZATION to add the template to the Organization Level Template library. **Any template shared with an organization and created by an organization administrator, or an organization compare user, can be utilized under any company within that specific organization. Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.**

Selecting export template:

Select file to export

Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

Saving New Export Template:

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Export Template

☒ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

GO TO ALL COMPARISONS

The data comparison and verification processes are complete. To see other comparisons or to begin a new, click GO TO ALL COMPARISONS.

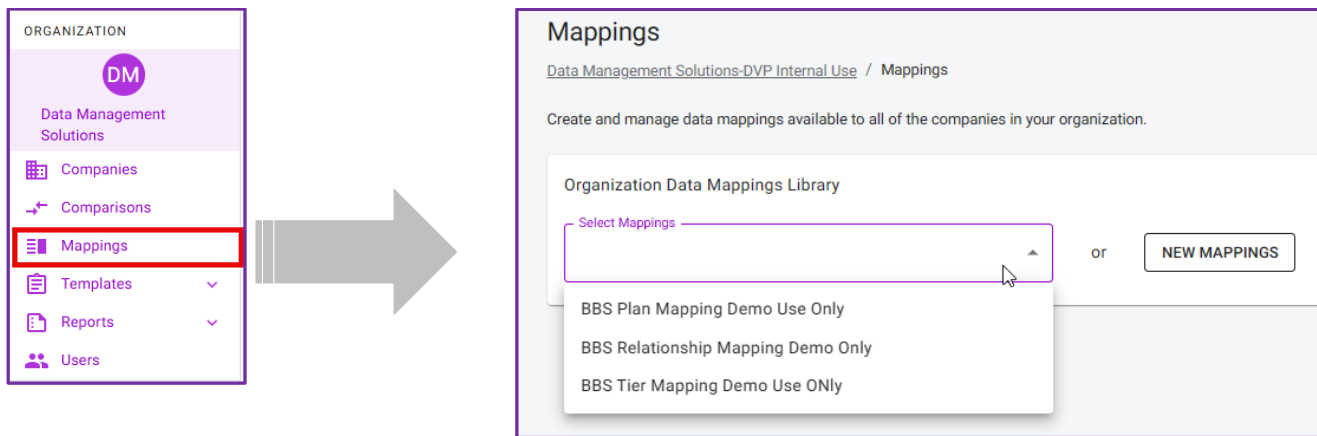
Questions: Contact Support@dms-datavalidate.com

Create Organization Level Mapping

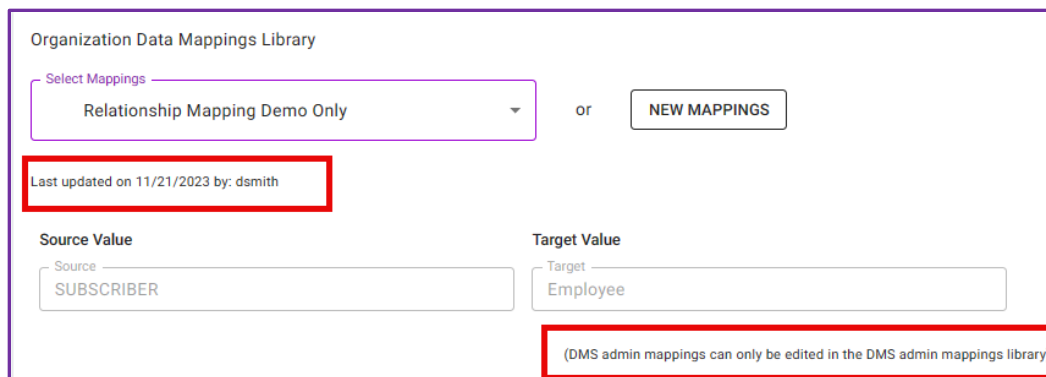
The Streamline application offers Organization Level mapping that can be used across multiple companies. This eliminates the need to create duplicate mappings such as coverage tier and relationship per company.

MAPPINGS under Organization Menu

New Mappings created at the Organization Level are automatically available to all companies within the organization.



The mapping creation level as well as when and who updated the mapping will be indicated below the mapping. Mappings can only be edited/deactivated/deleted at the creation level.



NEW MAPPINGS

This begins the mapping creation process. Add customized mapping for data such as plans, tiers, or departments by utilizing the NEW MAPPINGS button. Existing mappings for the company or created and shared at the Organization level can be re-used or new mappings can be created.

Mappings can be created several ways.

1. Manually create a mapping
2. Import a mapping
3. Copy and reuse an existing mapping

Organization Data Mappings Library

or

Name Mapping

Add an easily identifiable and relevant mapping name. Best practice is to use the data points in the mapping name. For example: BCBS Coverage Tier – EN Coverage Tier. Try to avoid names such as Mapping #1.

Organization Data Mappings Library

or

Excel file must have 2 columns: Source Value and Target Value

Source Value	Target Value
+ ADD MAPPING	

Manually Create a Mapping

Enter the Source and Target Values. This allows the system to convert the values and eliminate the need to manually change the values in the files. Once all values have been added, click SAVE MAPPINGS.

Organization Data Mappings Library

Select Mappings

or

NEW MAPPINGS

Data Mappings name
2025-2026 BCBS Medical Plan

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value	Target Value
Source Medical Plan 1	Target PPO
Source Medical Plan 2	Target HSA

+ ADD MAPPING

SAVE MAPPINGS

Import a Mapping

Enter a mapping name, then select **Import**.

The import file may be a single-sheet Excel file or a CSV file. If you are using an Excel file with multiple sheets, the mapping must be on the first tab—otherwise, the import will fail.

After the data is imported, click Save Mappings. The mapping is now saved and ready to use.

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Copy and Modify an Existing Mapping

To reuse an existing mapping, search for it in the Select Mappings dropdown. Once selected, click Copy Mappings. The name is appended with (COPY). Rename and make any needed adjustments to the source and target values. Click SAVE MAPPINGS to save the copied mapping.

Organization Data Mappings Library

Select Mappings
ACA Mapping

or

NEW MAPPINGS

COPY MAPPINGS

Last updated on 12/10/2025 by: milanier

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value

Source

Fulltime-Regular

Source

Fulltime-Temporary

Source

Parttime-Regular

Source

Parttime-Temporary

Target Value

Target

Eligible (Regularly works more than 30 hours a week)

Target

Eligible (Regularly works more than 30 hours a week)

Target

Ineligible (Regularly works less than 30 hours a week)

Target

Ineligible (Regularly works less than 30 hours a week)

+

ADD MAPPING

SAVE MAPPINGS

Organization Data Mappings Library

Select Mappings
ACA Mapping

or

NEW MAPPINGS

Data Mappings name

ACA Mapping (Copy)

IMPORT

Excel file must have 2 columns: Source Value and Target Value

Source Value

Source

Fulltime-Regular

Source

Fulltime-Temporary

Source

Parttime-Regular

Source

Parttime-Temporary

Target Value

Target

Eligible (Regularly works more than 30 hours a week)

Target

Eligible (Regularly works more than 30 hours a week)

Target

Ineligible (Regularly works less than 30 hours a week)

Target

Ineligible (Regularly works less than 30 hours a week)

+

ADD MAPPING

SAVE MAPPINGS



*** If a mapping is currently in use, it cannot be deleted or edited.

*** Deleted mappings are permanent and cannot be reversed.

Confirm below to permanently delete data mappings: BCBS Cov Type - EN Cov Level

CANCEL DELETE

CONFIRM DELETE



NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.

Data Mappings name
Deduction Code

Source Value	Target Value
Source STD	Target STD 14 day
Source STD	Target STD 30 day

Data Mappings name
Deduction Code

Source Value	Target Value
Source STD 14 day	Target STD
Source STD 30 day	Target STD

Template Library

The Streamline application template library contains three individual libraries:

1. Data Points templates
2. Export templates
3. Email templates

Both data points and export templates can be created and re-used during a compare. These two templates are created at the company level but can be shared with the organization. To access the library, click on TEMPLATES under the company menu and then select the type of template.

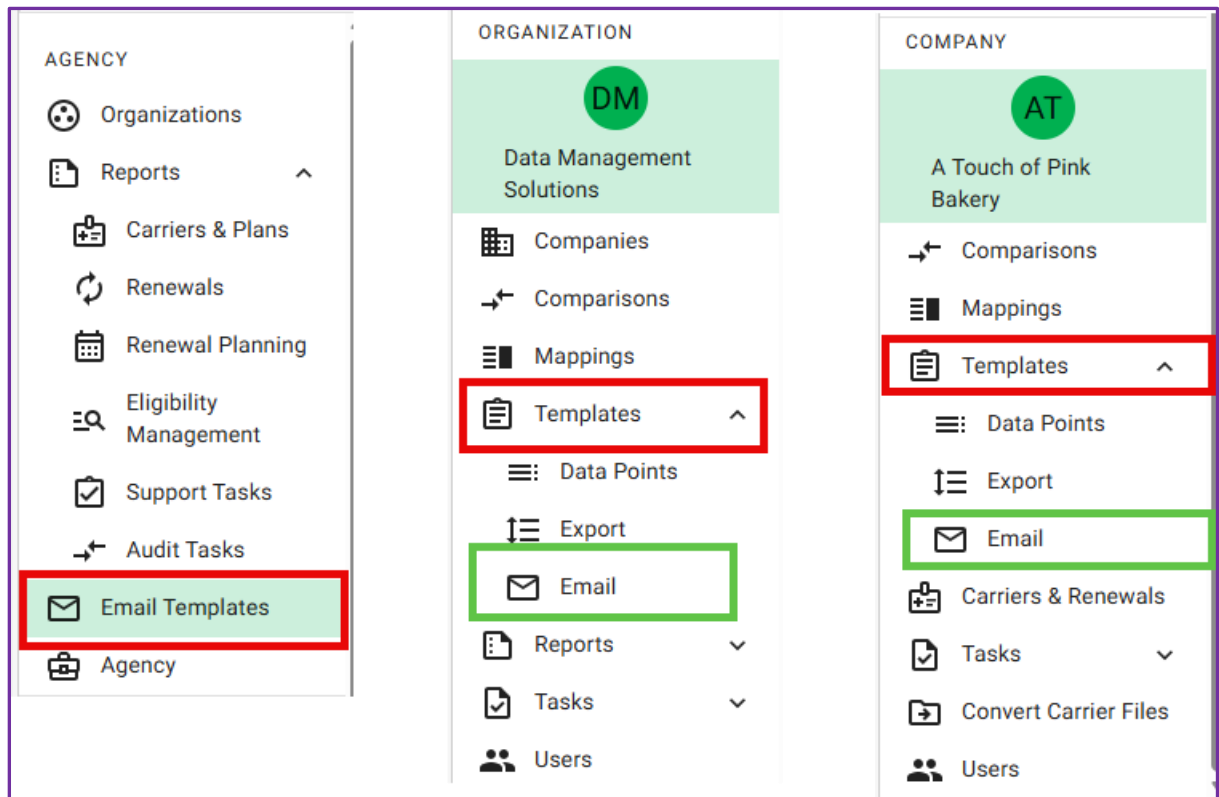
PLEASE NOTE: Any data point and export template shared with an organization and created by an organization administrator, or an organization compare user can be utilized under any company within that specific organization. Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

The data points and export templates are not editable other than the name. However, they can be deleted. Please be aware that a deleted template cannot be recovered, and the deletion is permanent. If deleted in error, the template will need to be recreated during the compare.

The email template library contains the default system generated emails for both the auditor and the verifier on both the organization and company levels. **Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.**

If customization is present the priority is

- Company-level templates take highest precedence
- Organization-level templates are used if no Company template exists
- Agency-level templates are used if neither Company nor Organization templates are available
- If no custom templates are configured, the system defaults to the standard system-generated template



A shared data point or export template will also contain the user who created/last updated the template as well as which company the template originated from.

[Data Management Solutions-DVP Internal Use](#) / [Data Points Templates](#) / [Demo Import Template](#)

[Browse the Data Points Templates](#) available to all companies during comparisons.

Data Points Template

Last updated on 3/26/2024 by: malanier2024

Baseline File	Secondary File	
Employee SSN	Employee SSN	☒ Unique Identifier
Social Security Number	Social Security Number	☒ Unique Identifier
First Name	First Name	☐ Unique Identifier
Middle Name	Middle Name	☐ Unique Identifier
Last Name	Last Name	☐ Unique Identifier
DOB	DOB	☐ Unique Identifier
Employment Status	Employment Status	☐ Unique Identifier

Adding and Removing Companies

Companies can be added or deactivated in the application as needed by the subscriber. A company export file for your specific organization is also available and will include the following fields:

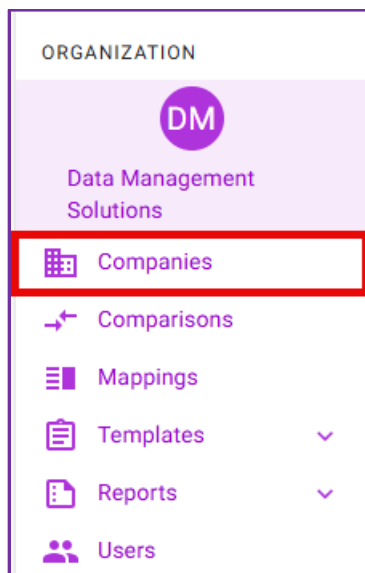
- Company name
- Active status
- Updated at timestamp
- Termination date and reason
- Activation date
- First demo date
- Any associated notes

Please note that only Organization Admins have the ability to deactivate or add a company.

Import Companies

The Streamline application provides the option to import companies into an organization as well as adding them manually. Using the provided import template, all companies can now be easily added to eliminate manual entry.

Companies can be imported into an organization by selecting Companies in the Organization menu.



Using the provided import template, complete the following fields:

- Company name (**Required**)
- Notes (Optional)
- First demo date (Optional)
- Activation date (Optional - effective date of company in the application)
- Primary Organization Contact Username (Optional)
- Secondary Organization Contact Username (Optional)
- Organization Benefit Admin System (Optional)

Note: The Organization Benefit Admin System must already exist under the organization for the import to succeed.

Including any additional columns will cause the import to fail.

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025

Choose file and click IMPORT.

Import Companies

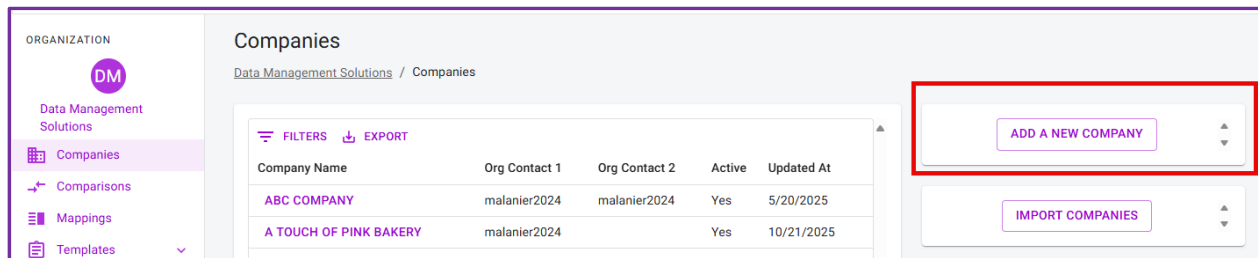
The file should be an Excel file matching the downloadable import template structure. Any additional columns or cells not formatted as Text, will cause the import to fail.

Choose File dms-compani...rt-template.xlsx

IMPORT

Manually add a Company

A company can be manually added to the application by clicking COMPANIES in the left-hand menu and then ADD A NEW COMPANY.



Add the following:

- Company name (Required)
- Demo - check if the company is a demo and to be excluded from exports.
- Activation date (Optional - effective date of company in application)
- First demo date (Optional)
- Primary Organization Contact (Optional – select from available dropdown. Only Admins and Comparers are included)
- Secondary Organization Contact (Optional – select from available dropdown. Only Admins and Comparers are included)
- GA Renewal Contact (This field is only available to DMS/Agency application users)
- Benefit Admin System (Optional - select from available dropdown)
- Notes (Optional)
- Kickoff Implementation Task – check if you would like to begin the Client Implementation Wizard. (Optional – The kickoff can be selected later if desired)

Once all information has been added, click SAVE.

New Company

Name

Demo

☐ Demo

Activation Date

First Demo Date

Primary Organization Contact

Secondary Organization Contact

GA Renewal Contact

Benefit Admin System

Notes

Implementation

☐ Kickoff Implementation Task

SAVE

Deactivate a Company

To deactivate a company, click EDIT

Information

 EDIT

Company Name	Organization Name
A Touch of Pink Bakery	Data Management Solutions

In the available screen, uncheck ACTIVE and enter a termination date and a termination reason for the deactivation. Click Save. **Please note that the date has to be current or past. Future termination dates are not available.**

Edit Company

Company Name

ABC Company

Notes

Active

☐ Active

Demo

☐ Demo

Termination Date



Termination Reason



Activation Date



Benefit Administration System Tracking

The Streamline application provides the option to track the benefit administration systems used for the organization which will then be available for selection at the Company Level. The tracking table is located on the Organization landing page.

Data Management Solutions-DVP Internal Use

Welcome, maryll!

Information

[EDIT](#)

Organization Name	Users Count
Data Management Solutions-DVP Internal Use	3
Total Companies Count	Active Companies Count
11	8
Inactive Companies Count	Active

Companies

[NEW](#)

- ABC Company
- Demo Company 1
- DS: Demo Company
- JB: Test company

Benefit Admin Systems

[NEW](#)

- Employee Navigator
Notes: EN contract began 01/01/2020
- Selerix
Notes: Selerix contract began 01/01/2022
- Other 2
Notes: Other added 04.29.2025

Service Types

[NEW](#)

- BBS License
Cost: 89.99
Billing Frequency: Monthly
Notes: This was the first service type
- Audit Services
Cost: 547.00
Billing Frequency: Quarterly
Notes: Audit services are billed quarterly

Add a Benefit Admin System

Navigate to the Organizations landing page as seen in the image above.

Click NEW

Benefit Admin Systems

[NEW](#)

- Employee Navigator
Notes: EN contract began 01/01/2020
- Selerix
Notes: Selerix contract began 01/01/2022
- Other 2
Notes: Other added 04.29.2025

Click NEW BENEFIT ADMIN SYSTEM

Organization Benefit Admin Systems

Select Existing Benefit Admin System

or

NEW BENEFIT ADMIN SYSTEM

Select the benefit admin system from the available dropdown.

New Benefit Admin System

Employee Navigator
Ease
Selerix
Plan Source
BSwift
Paycom
UKG Ready
UKG Pro
Other
Other 2
Other 3

Add any notes pertaining to the system and click SAVE. This system is now available to be added to a Company.

Organization Benefit Admin Systems

Select Existing Benefit Admin System

or

NEW BENEFIT ADMIN SYSTEM

New Benefit Admin System
Employee Navigator

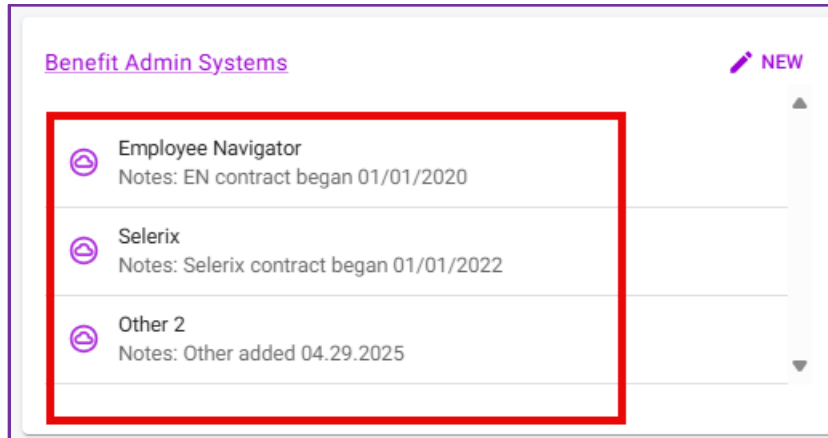
Notes

SAVE

[Edit/Delete a Benefit Admin System](#)

Navigate to the Organizations landing page

Click on the system that you want to edit or delete.

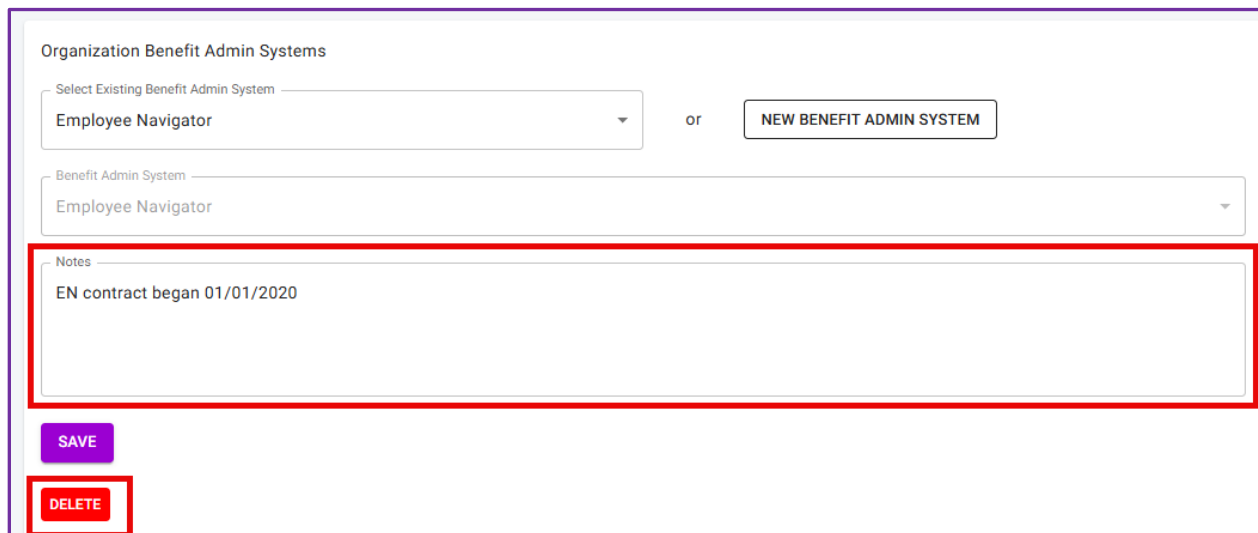


Benefit Admin Systems NEW

	Employee Navigator Notes: EN contract began 01/01/2020
	Selerix Notes: Selerix contract began 01/01/2022
	Other 2 Notes: Other added 04.29.2025

Currently the only field that can be edited is NOTES. Adjust as needed and click SAVE.

To delete the system from the Organization, simply click DELETE. However, please note that if the system is currently in use under a company, the system cannot be deleted. The system will need to be deleted from ALL companies in order to delete.



Organization Benefit Admin Systems

Select Existing Benefit Admin System or

Benefit Admin System

Notes

Service Type Tracking

The Streamline application allows tracking of service types used by the organization. **This information is view-only and accessible exclusively to the designated Billing Contact.** The service type table remains hidden from users who are not designated as the Billing Contact.

Billing Contact:

Non-Billing Contact:

The Service Type Tracking and the designated Billing Contact is managed by the Agency and cannot be changed by an Organization user.

How to Add a Service Type

1. Navigate to the Organization to add a new service type to
2. Click NEW on the Service Type section
3. Click NEW SERVICE TYPE

Service Types

[Data Management Solutions](#) / [Service Types](#)

View the Service Types in effect for this organization.

Organization Service Types

Select Existing Service Type

or

NEW SERVICE TYPE

4. Complete the following:

- Name** – Enter the name of the Service Type. This field is **required** and must be **unique**.
- Service Type** – Select one option from the dropdown.
- Billing Frequency** – Select the appropriate billing frequency from the dropdown.
- Cost** – Enter the associated cost for this service type for the organization.
- Notes** – Enter any additional information related to this service type.

Organization Service Types

Select Existing Service Type

or

NEW SERVICE TYPE

Name

Service Type

Billing Frequency

Cost

Notes

SAVE

5. Click **SAVE** to create new service type.

AGENCY

- Organizations
- Reports
- Email Templates
- Agency
- ORGANIZATION**
- Data Management Solutions
- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Tasks

COMPANY

- Select a Company
- Comparisons
- COMPANY
- Select a Company
- Comparisons
- Mappings
- Templates
- Carriers & Renewals
- Tasks
- Eligibility Management
- Support Tasks
- Audit Tasks
- Convert Carrier Files
- Users

Data Management Solutions

Information [VIEW](#)

Organization Name Data Management Solutions	Users Count 15
Total Companies Count 64	Active Companies Count 54
Inactive Companies Count 10	Active Yes
Demo No	Plan Platinum Elite
Admin & Comparer Seats 23	Agency Notes Ability to adds notes for an organization (DMS Admin) Was able to add notes as Org Admin
Subscription Type Monthly	Subscription Received Date 1/3/2024
First Demo Date	Billing Name

Companies [NEW](#)

- ABC Company
- Acme Company
- A Touch of Pink Bakery
- Big Group
- Black Jack Company
- Broker Builder Test Company: 1
- Company created as a GA Agent
- Covenant of Water
- Daphney Test Edited
- demo3
- Demo Company 06.03.2025
- Development Group LLC

Agency Connections [CONNECT](#)

- Streamline my Data Agency
Broker General Agent
- Broker Builder Solutions
Broker General Agent
- IMA
Broker General Agent
- My General Agent
Administrator

Benefit Admin Systems [NEW](#)

- Employee Navigator
Notes: First Use: 09/01/2022
- Other
Notes: Added by Org Admin
- Other 2

Service Types [NEW](#)

- Agency Support created as Agency Admin
Type: Agency Support
Cost: 2500
Billing Frequency: Annual
- Agency Support with Full Support
Type: Agency Support
Cost: 1500
Billing Frequency: Annual
Notes: Credit card on file.
- Agency Support with Limited Resources
Type: Agency Support
Cost: 152.00
Billing Frequency: Monthly
- HR Support
Type: HR Support
Cost: 3585.00
Billing Frequency: Case By Case

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How to Edit/Delete a Service Type

1. Navigate to the Organization to edit an existing service type.
2. Click SERVICE TYPES or NEW on the Service Type section

Service Types [NEW](#)

Agency Support created as Agency Admin
Type: Agency Support
Cost: 2500
Billing Frequency: Annual

3. Click SELECT EXISTING SERVICE TYPE and select the service type to edit

Service Types

[Data Management Solutions](#) / Service Types

View the Service Types in effect for this organization.

Organization Service Types

Select Existing Service Type

Agency Support created as Agency Admin
Agency Support with Full Support
Agency Support with Limited Resources
HR Support

or

NEW SERVICE TYPE

- Make changes and click SAVE
- Alternatively, if the service type is being deleted, click DELETE and then CONFIRM DELETE. **Please note that deletions are permanent and cannot be undone.**

Organization Service Types

Select Existing Service Type

Agency Support with Limited Resources

or

NEW SERVICE TYPE

Name

Agency Support with Limited Resources

Service Type

Agency Support

Billing Frequency

Monthly

Cost

152.00

Notes

SAVE

DELETE

Carrier Tracking

The Streamline application provides the option to import or to manually add carrier information for a company. Using the provided template the following information can be imported into the application:

- Company Name (**Required** and must match company name in application)
- Carrier Name (**Required** and must match carrier name found in Import Template)
- Group Number (**Required**)
- Renewal Month (**Required**)
- Renewal Kickoff Days in Advance (Can choose between 30 to 90 days)
- Carrier Invoice Day of Month (Optional)
- Eligibility Management Type (**Optional – However, it is a best practice to complete this field. Certain task types require this information to be populated.**)
- Commission Type (Optional)
- Commission (Optional but required if Commission Type selected)
- Carrier Inception Date (Optional)
- Carrier End Date (Optional)
- Disable Renewals (Optional Checkbox)
- Carrier Contact Name (Optional)
- Carrier Contact Email (Optional)
- Carrier Contact Phone Number (Optional)
- Notes (Optional)
- Secondary Carrier Contact Name (Optional)
- Secondary Carrier Contact Email (Optional)
- Secondary Carrier Contact Phone Number (Optional)
- Audit Service (Optional Checkbox)
- Organization Eligibility Contact (Optional – select from available dropdown)
- Organization Audit Contact (Optional – select from available dropdown)

Carrier Information can only be imported under the organization but can be manually added under on the Company level.

Carrier information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Import Carriers

The Import Carriers button can be found on the Organization level under the Companies page.

ORGANIZATION

DM

Data Management Solutions

COMPANIES

Companies

Data Management Solutions / Companies

FILTERS EXPORT

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025
BRITTANY DEMO	brokerverifier		Yes	9/10/2025
CARLA DEMO	brokerverifier		Yes	9/10/2025
CAULIFLOWER TESTING (INACT...			No	10/10/2025
CITY OF BRIDGERTON (INACTIV...			No	10/10/2025
DEMO COMP-08082024 (INACT...			No	10/10/2025

ADD A NEW COMPANY

IMPORT COMPANIES

IMPORT CARRIERS

IMPORT CARRIER PLANS

Select a Company

Using the provided import template, complete all required fields:

- Company Name: The company name must match the company name that is currently in the application. If the name does not match, the application will not be able to add the carrier information. (Required)
- Carrier Name: The available carriers are provided on a separate reference tab (Carriers(reference)) in the import template. If a desired carrier is not listed, a request can be made to add through our enhancement request form: [Enhancement Request Form - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com) (Required)
- Group Number: This is a free-from field for the Group Number assigned to the Company by the carrier. (Optional).
- Renewal Month (Required)
- Renewal Kickoff Days In Advance (Optional)
- Carrier Invoice Day Of Month (Optional)
- Eligibility Management Type (Optional – However, it is a best practice to complete this field. Certain task types require this information to be populated.)
- Commission Type (Optional)
- Commission (Optional but required if Commission Type selected)
- Carrier Inception Date (Optional)
- Carrier End Date (Optional)
- Disable Renewals (Optional)
- Carrier Contact Name (Optional)
- Carrier Contact Email (Optional)
- Carrier Contact Phone Number (Optional)
- Notes (Optional)
- Secondary Carrier Contact Name (Optional)
- Secondary Carrier Contact Email (Optional)
- Secondary Carrier Contact Phone Number (Optional)
- Audit Service (Optional)
- Organization Eligibility Contact Username (Optional)

- Organization Audit Contact Username (Optional)

The completed template can then be selected using the Choose File button and then IMPORT.

Import Company Carriers

[Data Management Solutions-DVP Internal Use](#) / [Companies](#) / Import Company Carriers

Import an Excel file to bulk import multiple carriers for any of your organization's companies in a single step.

Import Companies

The file should be an Excel file matching the downloadable import template structure. Any additional columns, invalid carriers, invalid companies, or cells not formatted as Text, will cause the import to fail.

Carrier Import.xlsx

Manually add Carriers

Carrier information can also be manually added on the Company level by selecting Carriers & Renewals from the left menu.

COMPANY

AT

A Touch of Pink Bakery

- ↔ Comparisons
- ☰ Mappings
- 📄 Templates ▼
- 👤 Users
- 📦 Carriers & Renewals**
- 📁 Convert Carrier Files

Click NEW

Carriers				 NEW
 FILTERS  EXPORT				
Carrier	Group Number	Renewal Month	Active	
ADMIN AMERICA	7841	November	Yes	
AMERITAS GROUP	AMG-123	December	Yes	

Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable. Click SAVE once all information has been added.

Once a carrier has been added to the company carrier library, it can then be selected during the audit creation process or updated at a later date.

New Carrier

Carrier

Please [contact us](#) to add a carrier not in this list.

Group Number

Renewal Month

Renewal Kickoff Days In Advance

Carrier Invoice Day Of Month

Eligibility Management Type

Commission Type

Commission

Carrier Inception Date

Carrier End Date

Disable Renewals

☐ Disable Renewals

Carrier Contact Name

Carrier Contact Email

Carrier Contact Phone

Secondary Carrier Contact Name

Secondary Carrier Contact Email

Secondary Carrier Contact Phone

Audit Service

☐ Audit Service

Organization Eligibility Contact

Organization Audit Contact

GA Eligibility Contact

GA Audit Contact

Notes

SAVE

Carrier Plan Tracking

The Streamline application provides the option to manually add carrier plan information for a company and a specific carrier as well as an import option. The following information can be added to the application:

- Carrier (Required and auto defaults to selected carrier)
- Plan Name (Required)
- Benefit Type (Required – select from available dropdown options)
- Group Number (Optional – If Group Number was added at Carrier Level, it will default to the Plan level. However, this field can be overwritten at the plan level)
- Eligibility Management Type (Optional – If Type was added at Carrier Level, it will default to the Plan level. However, this field can be overwritten at the plan level)
- Commission Type (If Type was added at Carrier Level, it will default to the Plan level. However, this field can be overwritten at the plan level)
- Commission (Optional but required if Commission Type selected)
- Disable Renewals (Optional Checkbox)
- Notes (Optional)

Carrier plan information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Import Plan

Carrier specific plans can be imported into the application. Using the provided carrier import template you can import the following fields:

- Company Name (Required)
- Carrier Name (Required – Carrier reference tab included in template)
- Plan Name (Required)
- Benefit Type (Required- Benefit Types reference tab included in template)
- Group Number (Optional)
- Eligibility Management Type (Optional)
- Commission Type (Optional)
- Commission
- Disable Renewals (Optional)
- Notes (Optional)

The Import Carriers button can be found on the Organization level under the Companies page.

ORGANIZATION

DM
Data Management Solutions

Companies

Comparisons

Mappings

Templates

Reports

Users

COMPANY

Select a Company

Companies

Data Management Solutions / Companies

FILTERS EXPORT

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025
BRITTANY DEMO	brokerverifier		Yes	9/10/2025
CARLA DEMO	brokerverifier		Yes	9/10/2025
CAULIFLOWER TESTING (INACT...			No	10/10/2025
CITY OF BRIDGERTON (INACTIV...			No	10/10/2025
DEMO COMP-08082024 (INACT...			No	10/10/2025

ADD A NEW COMPANY

IMPORT COMPANIES

IMPORT CARRIERS

IMPORT CARRIER PLANS

Using the provided carrier import template, complete all required fields:

- Company Name (Required)
- Carrier Name (Required – Carrier reference tab included in template)
- Plan Name (Required)
- Benefit Type (Required- Benefit Types reference tab included in template)
- Group Number (Optional)
- Eligibility Management Type (Optional)
- Commission Type (Optional)
- Commission
- Disable Renewals (Optional)
- Notes (Optional)

The completed template can then be selected using the Choose File button and then IMPORT.

Import an Excel file to bulk import multiple carrier plans for any of your organization's companies in a single step.

Import Company Carrier Plans

The file should be an Excel file matching the downloadable import template structure. Any additional columns, invalid or missing carriers, invalid companies, or cells not formatted as Text, will cause the import to fail.

All carriers **MUST** be added to the company prior to importing plans.

Choose File No file chosen

IMPORT

DOWNLOAD IMPORT TEMPLATE



Carriers must be added to each company before importing plans. You may also import multiple plans across multiple carriers and companies in a single import

Manually Add Plan

Plan information can be manually added on the Company level by selecting Carriers & Renewals from the left menu.

COMPANY

AT

A Touch of Pink Bakery

↔ Comparisons

☰ Mappings

📄 Templates ▾

👤 Users

📦 Carriers & Renewals

📁 Convert Carrier Files

Select the carrier that you would like to add a plan to. Please note that the carrier has to be added prior to adding a plan.

The table below shows the carriers that have been added for your company. [ADD A NEW CARRIER](#)

Carrier	Group Number	Renewal Month	Eligibility Management Type	Active	Notes
CVS CAREMARK	PIU-9874	August		Yes	
CIGNA	C123456	February		Yes	Demo
UNITEDHEALTHCARE	UH98745	January		Yes	
ACCESS HEALTH	789541	January		Yes	No notes

Click ADD A NEW PLAN. The location of ADD A NEW PLAN will vary if there are existing plans under the carrier.

Carrier Information

[EDIT](#)

Carrier	Group Number
CVS Caremark	PIU-9874
Renewal Month	Renewal Kickoff Days In Advance
August	
Carrier Invoice Day Of Month	Eligibility Management Type
1	
Carrier Inception Date	Carrier End Date

Carrier Plans

Plan Name	Benefit	Eligibility Management Type	Inception Date	End Date	Disable Renewals	Active
No Plans Exist						

[ADD A NEW PLAN](#)

Carrier Information

[EDIT](#)

Carrier	Group Number
UnitedHealthcare	UH98745
Renewal Month	Renewal Kickoff Days In Advance
January	
Carrier Invoice Day Of Month	Eligibility Management Type
15	
Carrier Inception Date	Carrier End Date

Carrier Plans

[ADD A NEW PLAN](#)

[FILTERS](#)
[EXPORT](#)

Plan Name	Benefit	Eligibility Management Type	Inception Date	End Date	Disable Renewals	Active
PLAN 1 GOLD	Medical				No	Yes

Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable. The fields highlighted in Green are for Agency use only and are not editable to the organization user. Click SAVE once all information has been added.

New Plan

Carrier

Guardian

Plan Name

Benefit Type

Group Number

Using Carrier Group Number: GP-4785

Eligibility Management Type

Using Carrier Eligibility Management Type: Agency Managed DEX

Commission Type

Commission

Disable Renewals

☐ Disable Renewals

Number of Eligible

Number of Enrolled

GA Eligibility Contact

GA Audit Contact

Notes

SAVE

Email Customization

The Streamline application has customized emails available at the agency, organization, and company levels. **Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.**

Customization is available for the following:

- Audit Task Assignment
- Audit Task Complete
- Comparison to Auditor
- Comparison to Verifier
- Eligibility Management Task Assignment
- Eligibility Management Task Assignment - Error Report
- Eligibility Management Task Complete
- Renewal Task Assignment
- Renewal Task Broker Managed
- Renewal Task Complete
- Renewal Task Kickoff
- Renewal Task Kickoff Follow Up
- Implementation Task Assignment
- Implementation Task Complete
- Implementation Task Kickoff
- Implementation Task Kickoff Follow Up
- Migration Task Assignment
- Migration Task Complete
- Migration Task Kickoff
- Migration Task Kickoff Follow Up
- Support Task Assignment
- Support Task Complete

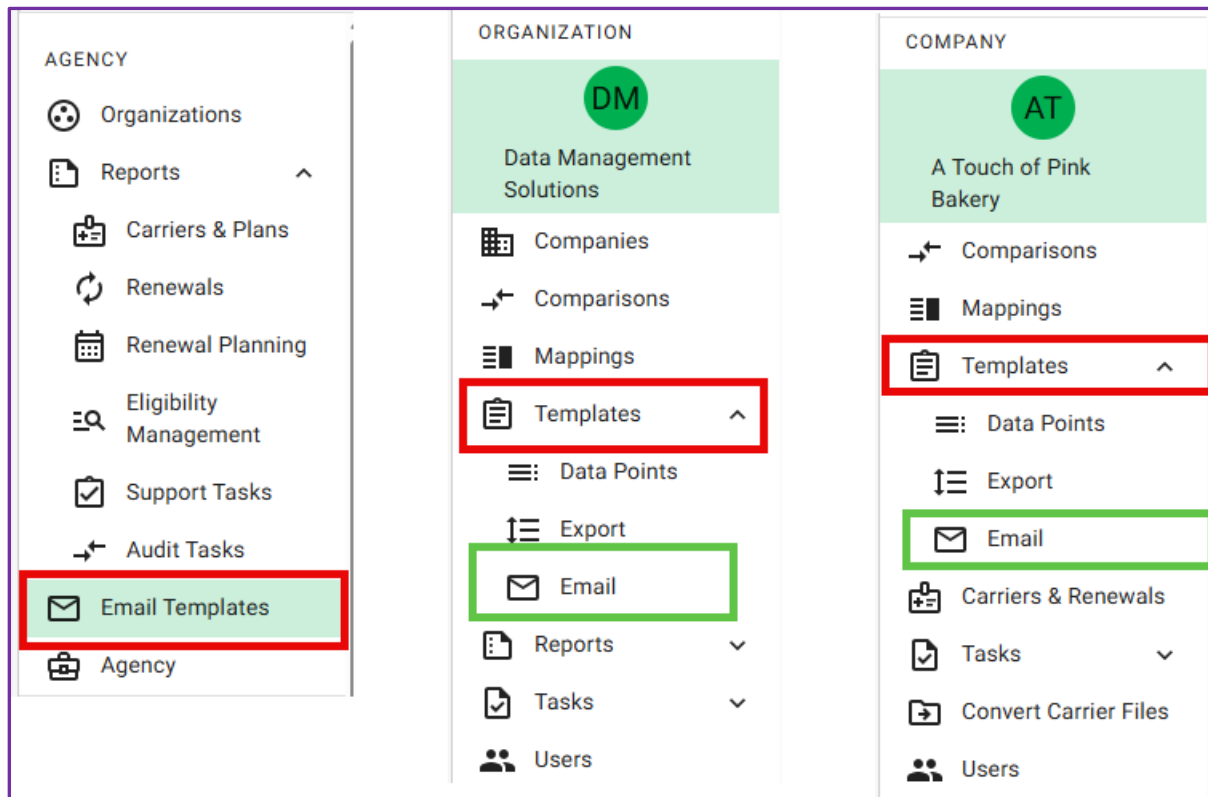
Key Features:

1. Customizable Templates:

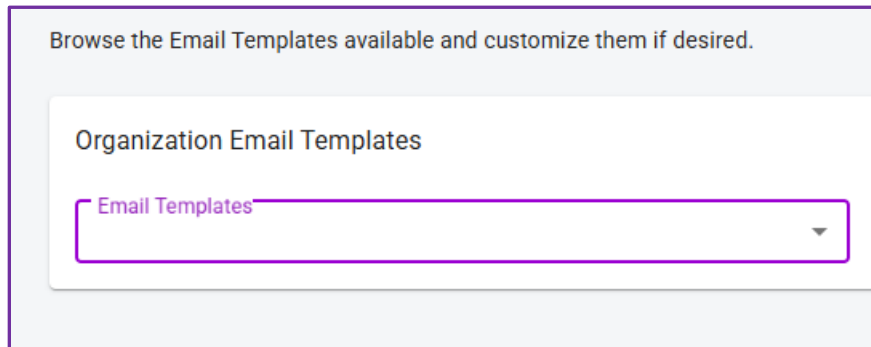
- Email templates can be found in the template library at the agency, organization, and company levels.
 - Default language can be fully customized to suit user preferences.
2. Additional Tokens:
- Include dynamic data like carrier name, discrepancy counts, and renewal month in your emails for more personalized and informative communication.
3. Priority Rules:
- Company-level templates take highest precedence
 - Organization-level templates are used if no Company template exists
 - Agency-level templates are used if neither Company nor Organization templates are available
 - If no custom templates are configured, the system defaults to the standard system-generated template

How to Customize an Email

1. To customize an email, navigate to the **Template Library** at the **Agency**, **Organization**, or **Company** level, then select **EMAIL**.
 - At the **Agency level**, only the Email Template Library is available, so no dropdown will be displayed.
 - At the **Organization** and **Company** levels, a dropdown will be available for selection.



- From the Email templates dropdown, select the desired template to customize.



- Click the edit icon (✎). Please note that if a trashcan icon (🗑) is available, there is current customization in place for this email.

Agency Email Templates

Email Templates
Audit Task Assignment



This is a system default email template. Click the edit button above to customize it.

Email subject

Insert token

{{agency_name}}: You have been assigned to {{company_name}} audit task: {{audit_task_name}}.

Email body

Paragraph | B | I |  | Insert token

Hello {{assignee_first_name}} {{assignee_last_name}},
You have been assigned a new audit task: {{audit_task_name}} for company: {{company_name}}. A comment may be included below.
{{task_notes}}
{{audit_task_direct_link_with_log_in_message}}
Thank you,
on behalf of {{from_first_name}} {{from_last_name}}, {{agency_name}}

Agency Email Templates

Email Templates
Audit Task Assignment

This is a custom email template. It was last updated on 3/30/2026 by: gaagent. Click the edit button above to customize it, or click the delete button to restore the system default template.

Email subject

Insert token

{{agency_name}}: You have been assigned to {{company_name}} audit task: {{audit_task_name}}.

- Add customized language to the subject line as well as the body. Tokens are available as well and can be added to the email. Tokens vary by email.
- Click SAVE once customized.

CANCEL
SAVE

BenOps: Client Implementation Wizard



The Client Implementation Wizard is a collaborative workspace that helps clients collect, organize, and review the information needed to build a new group within a benefit administration system.

Using a structured workflow, the process captures key company details, organizational structure, eligibility rules, and plan information. This includes company contacts, payroll groups, classes, departments, locations, carrier and plan details, rates, contributions, eligibility requirements, and supporting documents, providing a centralized process for implementation setup and review.

Who Does What?

GA (General Agent) / Organization Admin → Starts the implementation, reviews/approves, enters testing details, closes task.

Organization Contacts → Provides client information, completes plans checklist, tests, and approves the implementation to Go Live.

How It Works

Step 1: GA/Org Admin Initiates a Client Implementation

- User logs into the **Streamline application**.
- Navigate to the Organization/Company section depending on next steps.
 - If creating a new company,
 - Navigate to the Organization and then Companies
 - Click Add a New Company and add all applicable information.
 - Check the Kickoff Implementation Task option

Implementation

☐ Kickoff Implementation Task

SAVE

- If existing company,
 - Navigate to the specific company detail page.
 - Click New in the Implementation Task section

Heaven to Earth Skydiving & Training Center

Information		EDIT
Company Name	Organization Name	
Heaven to Earth Skydiving & Training Center	Data Management Solutions	
Comparisons Count	Users Count	
0	0	
Carriers Count	Active	
3	Yes	
Demo	Primary Org Contact	
No	gaagent (GA Agent)	
Primary Org Contact Email	Benefit Admin System	
gaagent25@gmail.com	Employee Navigator	

Comparisons	NEW
No Comparisons Exist	

Carriers	NEW
90 Degree Benefits	
Access Health	
Alliant Health Plan	

Implementation Tasks	NEW
No Implementations Exist	

- Complete the following fields:
 - Implementation Task Name: This typically defaults to the Company Name but can be changed. The company name is not impacted by the task name change.
 - Primary Organization Contact (Required)
 - Secondary Organization Contact (Optional)
 - Select either an **Assignee** or an **Assignee Agency**.
 - **Assignee**: Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
 - **Assignee Agency**: Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.

Assignee User

Assignee Agency

Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.

- Benefit Admin System (Required)
- Disable Emails (Optional) - if the user does not want any system-generated emails sent for a specific renewal.

Please note: Once this option is selected, it cannot be changed. Emails will remain disabled for the duration of the renewal, and there is no option to re-enable them.

Add New Implementation



[Heaven to Earth Skydiving & Training Center](#) / Add New Implementation

Complete the form below to create a new implementation task for this company.

New Implementation

Implementation Name
Heaven to Earth Skydiving & Training Center

Primary Organization Contact
gaagent (GA Agent)
Email: gaagent25@gmail.com

Secondary Organization Contact

GA Assignee

Benefit Admin System
Employee Navigator

Emails

☐ Disable Emails

Check this box to disable all system generated emails for this implementation. NOTE: emails will be disabled for this entire implementation process, with no mechanism to re-enable them.

SAVE

- **IF DISABLE EMAILS IS NOT CHECKED**, an **automated email** notifies the designated Primary, Secondary, and GA Assignee contact that an implementation has been created.
-

Step 2: Organization Completes Client Information

- The Organization will receive an Implementation Kickoff email outlining the next required actions. This email includes a link that, once logged into the application, allows the Organization user to easily access the implementation and begin **Step 1: Client Information**.
- The user will then complete the Required fields:
 - **Company Information**
 - **Company Address**
 - **Company Tax ID**
 - **Benefit Eligible Lives**
 - **Company Contacts – Can add multiple contacts**
 - Name
 - Email
 - Job Title
 - Phone
 - **Payroll Groups, Classes and Entry/Eligibility Rules – Can add multiple payroll groups and multiple classes per payroll group**
 - Payroll Group
 - Pay Frequency
 - First Pay Date
 - Classes – can add multiple classes per payroll group
 - Class Name
 - Benefits Eligible Monthly Hour Minimum

- Notes
 - Benefit Entry Rule
 - Benefit Waiting Period
 - Benefit Termination Rule
 - Rehire Entry Rule
 - Rehire Waiting Period
 - Rehire Coverage Grace Period
 - Demographic Entry Rule
 - Demographic Waiting Period
- **Locations (Office, Divisions, Departments, Business Units)** – Different information is required based on location type.

- Office

Location Type Office	Name
Address	City
State	Zip
County	Contact Name
Contact Email	Notes

- Division

Location Type Division	Name
Notes	

- Department

Location 1  REMOVE

Location Type
Department ▼

Name

Notes

- Business Unit

Location Type
Business Unit ▼

Name

Tax ID

Notes

- Comments

- Click **Submit Client Information** → GA is notified for review. Alternatively, **Save Draft** can be selected if not ready to submit for review and need to come back to at a later date.

Step 3: Organization Completes Plans Checklist

- Click **ADD NEW PLAN**
 - **Select the carrier**
 - **Select the Renewal Month**
 - **Add a Plan Name**
 - **Select the Benefit Type**

Add New Plan

Add a plan to the checklist. If this carrier has not been set up for this company yet, it will be created.

Carrier

Please [contact us](#) to add a carrier not in this list.

Renewal Month

Plan Name

Benefit Type

- Implementation Details
 - Complete the fields per Plan
 - Is this plan being implemented? —Defaults to YES
 - General Plan Implementation Notes and File Upload
 - Rates, Rounding, Contributions, or Plan Limits Notes and File Upload
 - Eligibility Notes and File Upload
 - Comments
 - Submit Plan Information
- Plans Documents Upload – This is an area that you can upload a document(s) that is applicable to ALL plans including census files.
- Comments

Plans Checklist

Each plan requires its implementation details to be submitted before the entire plans checklist can be submitted to the GA Contact for review.

Plan Name

Voluntary STD (Guardian)

Plan Details

Implementation Details

Is this plan being implemented?

Yes

General Plan Implementation Notes

General Plan Documents

Only add documents applicable to this specific plan. For documents applicable to all plans, add on the plans checklist page.

No General Plan Documents found.

ADD FILE

Rates, Rounding, Contributions, or Plan Limits Notes

Rates, Rounding, Contributions, or Plan Limits Documents

Only add documents applicable to this specific plan. For documents applicable to all plans, add on the plans checklist page.

No Rates, Rounding, Contributions, or Plan Limits Documents found.

ADD FILE

In the Eligibility Notes below, please specify if eligibility varies by class and if so which classes are eligible for this plan.

Eligibility Notes

Eligibility & Census Documents

Only add eligibility and census documents applicable to this specific plan. For eligibility and census documents applicable to all plans, add on the plans checklist page.

No Eligibility & Census Documents found.

ADD FILE

Comments

BACK

SUBMIT PLAN INFORMATION

- Repeat the process above for each plan listed until all statuses have been changed to SUBMITTED.

- Once all plans are submitted, click **Submit Plans Checklist** → GA is notified by an email.

Plans Checklist

Each plan requires its implementation details to be submitted before the entire plans checklist can be submitted to the GA Contact for review.

Steps to complete plans checklist:

- Plans Checklist** - Add all benefit plans to be implemented. This should include plan documents, rate tables and census files. If you have documents that are applicable to all plans, including census files, you may add them in Step 2.
- Add Documents** - This step should be used to add documents that are specific to ALL plans, including census files.
- Post Comments** - If you have additional comments or specific information to communicate, add the information in the comments
- Submit Plans Checklist**

Plans Checklist

Plan Name	Carrier	Benefit Type	Status	Implementing?
VOLUNTARY STD	Guardian	Voluntary Short Term Disa...	✓ SUBMITTED	Yes
Total Rows: 1				

+ ADD NEW PLAN

Plans Documents

Documents Applicable to All Plans (including Census)

No Documents Applicable to All Plans (including Census) found.

ADD FILE

SAVE DOCUMENTS

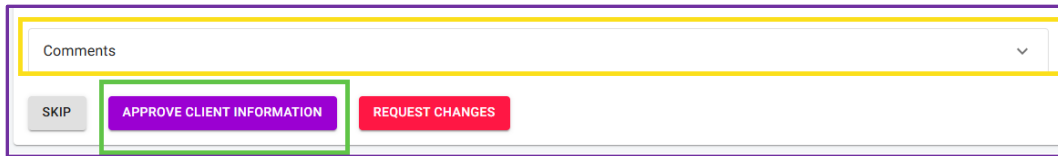
Comments

SUBMIT PLANS CHECKLIST

Step 4: GA Reviews & Collaborates

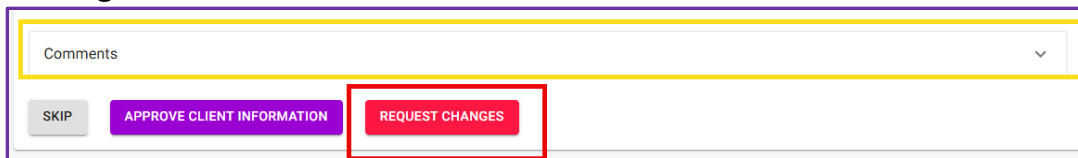
- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
 - GA Review Client Information – Approval**

After the organization contacts have entered all required information, and no further details are needed, the GA should add any desired comments and then click **APPROVE CLIENT INFORMATION**.



GA Review Client Information – Request Changes

If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts

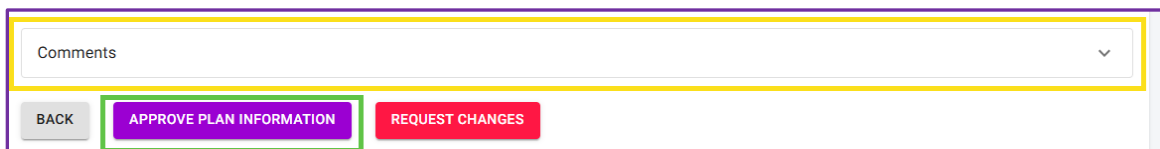


GA Review Plans Checklist – Approval

For each listed plan, click the Plan Name or Status to review.

REQUEST CHANGES TO PLANS CHECKLIST				
Plan Name	Carrier	Benefit Type	Status	Renewing?
2025 DENTAL HIGH	Admin America	Dental	GA REVIEW	Yes
2025 MEDICAL OPTION 2-PPO PLAN	Admin America	Dental	GA REVIEW	Yes

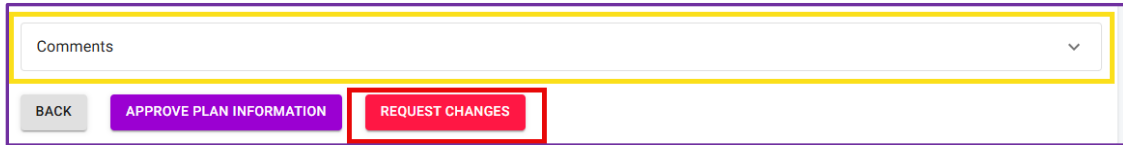
If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION**.



GA Review Plans Checklist – Request Changes

If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to

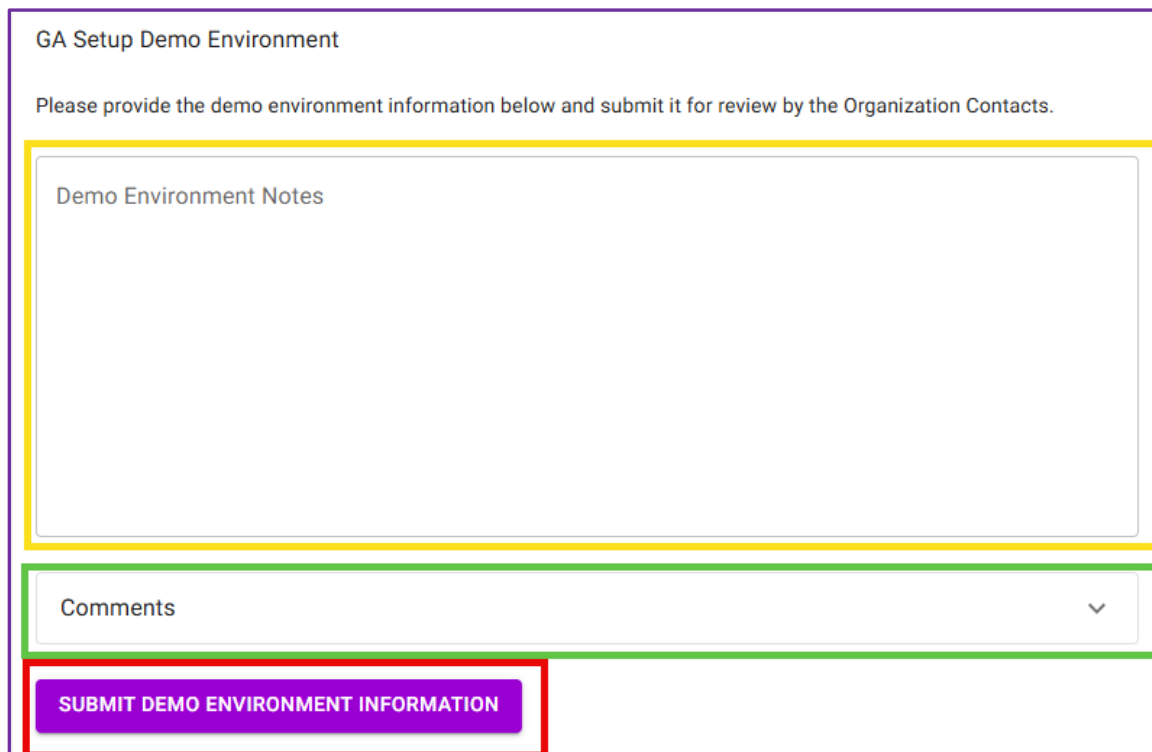
the organization contacts



- When all plans have been approved, click **APPROVE PLANS CHECKLIST**.
- Collaboration continues until both steps are approved.

Steps 5 & 6: Testing & Go Live

- Once the Client Information and the Plans Checklist have been approved, it is time to set up the Demo Environment in the Benefit Administration System. On Step 5, the GA enters **testing details** such as demo users and instructions in the Demo Environment Notes section as well as any additional comments or files and then clicks SUBMIT DEMO ENVIRONMENT INFORMATION.



- Organization is notified by automated email and begins testing in the **Benefit Administration System**.
- Request Changes:

- If changes are needed, the Organization user will add a comment and/or files requesting the change to the Benefit Administration system and click **Request Change**.
- After successful testing:
 - Organization checks all acknowledgment boxes if all testing was successful.
 - Clicks **Go Live** (button activates only when all boxes are checked).

Review Demo Environment

The Organization Contacts will review the submitted demo environment information below and either approve or request changes.

Demo Environment Information

Demo Environment Notes

Demo Users:

username: Demo

password: Testing

Please check everything.

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- ☐ Are the benefit plans associated with each class showing as expected?
- ☐ Do ALL employee per pay deductions reflect as expected (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- ☐ Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- ☐ Do all plan documents associated with each plan reflect as expected?
- ☐ Does all plan communication language reflect as expected?
- ☐ Are all onboarding/employee tasks showing as expected (if applicable)?
- ☐ Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE

REQUEST CHANGES

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- ☒ Are the benefit plans associated with each class showing as expected?
- ☒ Do ALL employee per pay deductions reflect as expected (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- ☒ Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- ☒ Do all plan documents associated with each plan reflect as expected?
- ☒ Does all plan communication language reflect as expected?
- ☒ Are all onboarding/employee tasks showing as expected (if applicable)?
- ☒ Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE

REQUEST CHANGES

Step 7: Implementation Completion

- Once live, the implementation is **locked**—previous steps cannot be reopened.
- Post-Go Live:

Organization Contacts: The implementation is complete, and no further action is required. However, if changes are requested after the renewal has gone live, the organization may still add comments or upload documents linked to specific plans.

Implementation: Heaven to Earth Skydiving & Training Center-DEMO

Heaven to Earth Skydiving & Training Center / Heaven to Earth Skydiving & Training Center-DEMO - Live

✓ Client Information
✓ Plans Checklist
✓ GA Review Client Information
✓ GA Review Plans Checklist
✓ GA Setup Demo Environment
✓ Review Demo Environment
✓ Live

Information

Live

This implementation is marked to go live! You can view the details of this implementation by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this implementation, please submit a comment with this information below.

Comments

Comments

Add a comment if you'd like to provide any additional context or information.

Paragraph **B** *I* U U

☐ GA Internal Comment

If this comment applies to a particular Plan please select it below.

Plan

Attachments

[ADD FILE](#)

SUBMIT COMMENT

- GA closes the implementation task in the system. Please notice that the **Complete & Close Task** is only available on the GA Contact access.

Implementation: Heaven to Earth Skydiving & Training Center-DEMO

BENOPS

[Heaven to Earth Skydiving & Training Center](#) / Heaven to Earth Skydiving & Training Center-DEMO - Live

☒ Client Information
 ☒ Plans Checklist
 ☒ GA Review Client Information
 ☒ GA Review Plans Checklist
 ☒ GA Setup Demo Environment
 ☒ Review Demo Environment
 ☒ Live

Information

Live

This implementation is marked to go live! You can view the details of this implementation by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this implementation, please submit a comment with this information below.

Comments

COMPLETE & CLOSE TASK

- A **final closeout email** is sent, marking the implementation complete.

BenOps: Client Migration Wizard



The Client Migration Wizard is a collaborative workspace that helps clients collect, organize, and review the information needed to migrate a new group from one benefit administration system to another.

By standardizing the migration process, the Migration Wizard improves visibility into project status, helps ensure important implementation steps aren't missed, and creates a complete history of migration activities and supporting documentation. The result is better collaboration and a more organized migration from start to finish.

Who Does What?

GA (General Agent) / Organization Admin → Starts the migration

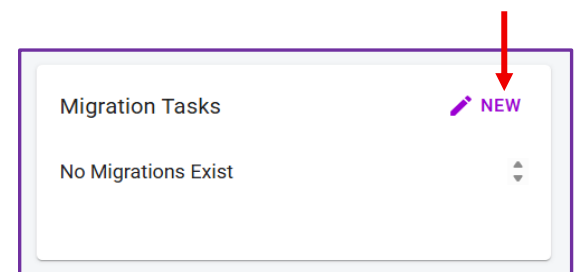
GA (General Agent) → Gathers client information, enters testing details, closes task.

Organization Contacts → Tests and approves the migration to Go Live.

How It Works

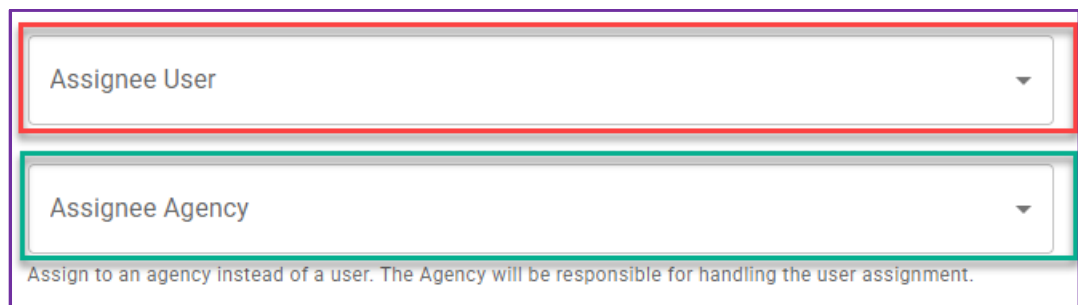
Step 1: GA/Org Admin Initiates a Client Migration

- User logs into the **Streamline application**.
- Navigate to the Organization/Company section.
- Click New in the Migration Tasks section
 - Complete the following fields:
 - Implementation Task Name: This typically defaults to the Company Name but can be changed. The company name is not impacted by the task name change.
 - Primary Organization Contact (Required)
 - Secondary Organization Contact (Optional)
 - Select either an **Assignee** or an **Assignee Agency**.



- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.



Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.

- **Disable Emails (Optional)** - if the user does not want any system-generated emails sent for a specific renewal.

Please note: Once this option is selected, it cannot be changed. Emails will remain disabled for the duration of the renewal, and there is no option to re-enable them.

Add New Migration

[Mildly Impressive Enterprises](#) / Add New Migration

Complete the form below to create a new migration task for this company.

New Migration

Migration Name

Mildly Impressive Enterprises

Primary Organization Contact

Secondary Organization Contact

GA Assignee

Assignee Agency

Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.

Emails

☐ Disable Emails

Check this box to disable all system generated emails for this migration. NOTE: emails will be disabled for this entire migration process, with no mechanism to re-enable them.

SAVE

- **IF DISABLE EMAILS IS NOT CHECKED**, an **automated email** notifies the designated Primary, Secondary, and GA Assignee contact that an implementation has been created.

Step 2: General Agent Completes Client Information

- If the migration was kicked off by the Organization, the General Agent (GA) default support email will receive a Migration Kickoff email outlining the next required actions. This email includes a link that, once logged into the application, allows the GA user to easily access the implementation and begin **Step 1: Client Information**.
- The user will then complete the following fields:
 - Migration Name – defaults to the company name but can be changed as needed.
 - Origin System – the ben admin system the migration data is coming from
 - Target System – the ben admin system the migration data is going to

- Login Credentials Received Date – the date the login credentials were received
 - Group Structure Setup Date – the date the group structure was setup in the target system
 - Eligibility, Plans, Rates Setup Date – the date the eligibility, plans, and rates were setup in the target system
 - Plan Communications & Documents Setup Date – the date the plan communications and documents were setup in the target system
 - Onboarding & PTO Setup Date (Optional) – that date the onboarding and PTO were setup in the target system
 - Demographic & Enrollment Data Extracted Date – that date the data was extracted from the origin system
 - Demographic & Enrollment Data Imported Date– that date the data was imported into the target system
 - General Client Information Files - This is an area where document(s) that are applicable to this migration including census data can be uploaded.
 - Comments
- Click **Submit Client Information** → GA is notified to complete the next step: GA Setup Demo Environment. Alternatively, **Save Draft** can be selected if not ready to submit for review and need to come back to at a later date.

Steps 3 & 4: Testing & Go Live

- Once the Client Information has been approved, it is time to set up the Demo Environment in the Benefit Administration System. On Step 3, the GA enters **testing details** such as demo users and instructions in the Demo Environment Notes section as well as any additional comments or files and then clicks SUBMIT DEMO ENVIRONMENT INFORMATION.

GA Setup Demo Environment

Please provide the demo environment information below and submit it for review by the Organization Contacts.

Demo Environment Notes

Comments

SUBMIT DEMO ENVIRONMENT INFORMATION

- Organization is notified by automated email and begins testing in the new **Benefit Administration System**.
- Request Changes:
 - If changes are needed, the Organization user will add a comment and/or files requesting the change to the Benefit Administration system and click **Request Change**.
- After successful testing:
 - Organization checks all acknowledgment boxes if all testing was successful.
 - Clicks **Go Live** (button activates only when all boxes are checked).

Review Demo Environment

The Organization Contacts will review the submitted demo environment information below and either approve or request changes.

Demo Environment Information

Demo Environment Notes

Demo Users:
username: Demo
password: Testing

Please check everything.

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- ☐ Are the benefit plans associated with each class showing as expected?
- ☐ Do ALL employee per pay deductions reflect as expected (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- ☐ Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- ☐ Do all plan documents associated with each plan reflect as expected?
- ☐ Does all plan communication language reflect as expected?
- ☐ Are all onboarding/employee tasks showing as expected (if applicable)?
- ☐ Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE

REQUEST CHANGES

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- ☒ Are the benefit plans associated with each class showing as expected?
- ☒ Do ALL employee per pay deductions reflect as expected (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc....?)
- ☒ Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- ☒ Do all plan documents associated with each plan reflect as expected?
- ☒ Does all plan communication language reflect as expected?
- ☒ Are all onboarding/employee tasks showing as expected (if applicable)?
- ☒ Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE

REQUEST CHANGES

Step 5: Migration Completion

- Once live, the migration is **locked**—previous steps cannot be reopened.
- Post-Go Live:

Organization Contacts: The implementation is complete, and no further action is required. However, if changes are requested after the renewal has gone live, the organization may still add comments or upload documents linked to specific plans.

Migration: Mildly Impressive Enterprises
[Mildly Impressive Enterprises](#) / Mildly Impressive Enterprises - Live

✓ Client Information — ✓ GA Setup Demo Environment — ✓ Review Demo Environment — 4 Live

Information ▾

Live

This migration is marked to go live! You can view the details of this migration by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this migration, please submit a comment with this information below.

Comments ▴

Add a comment if you'd like to provide any additional context or information.

Paragraph ▾ | **B** | *I* | |

Attachments

ADD FILE

SUBMIT COMMENT

- GA closes the migration task in the system. Please notice that the **Complete & Close Task** is only available on the GA Contact access.

Migration: Mildly Impressive Enterprises
[Mildly Impressive Enterprises](#) / Mildly Impressive Enterprises - Live

✓ Client Information — ✓ GA Setup Demo Environment — ✓ Review Demo Environment — 4 Live

Information ▾

Live

This migration is marked to go live! You can view the details of this migration by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this migration, please submit a comment with this information below.

Comments ▾

COMPLETE & CLOSE TASK

- A final closeout email is sent, marking the migration complete.

BenOps: File Implementation

The File Implementation task within Eligibility Management Tasks provides a centralized workflow for managing the setup and implementation of company files, including 834 EDI, Data Exchange, and Proprietary file types. This task streamlines the implementation process by creating a consistent workflow while improving visibility, tracking, and accountability from initial setup through production deployment.

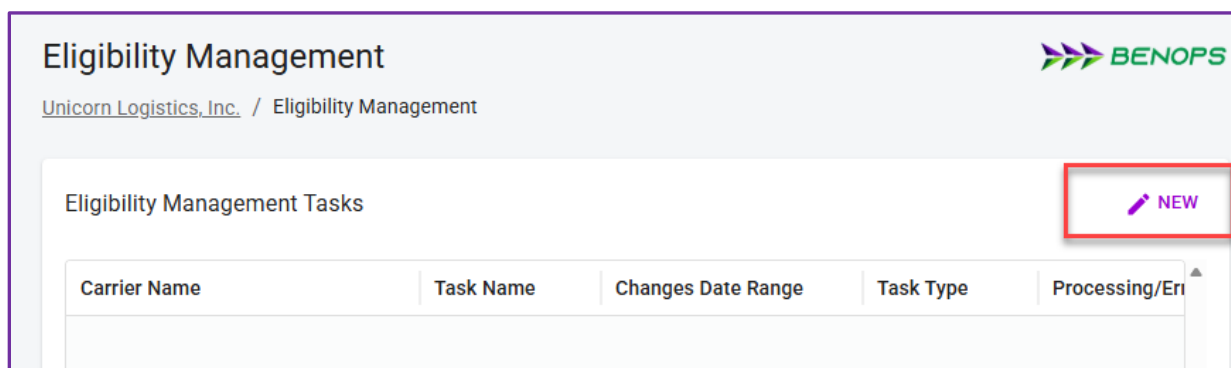
Who Does What?

GA (General Agent) → Starts the implementation, reviews/approves, enters testing details, closes task.

How It Works

Creating a File Implementation Eligibility Management Task

1. GA logs into the Streamline application.
2. Navigate to the applicable **Organization > Company** with the upcoming file implementation.
3. Under **Eligibility Management Tasks**, select **New**.



The screenshot shows the 'Eligibility Management' section of the application. The breadcrumb trail indicates the user is in 'Unicorn Logistics, Inc. / Eligibility Management'. Below this, there is a section titled 'Eligibility Management Tasks'. In the top right corner of this section, a red box highlights a button with a purple pencil icon and the text 'NEW'. Below the button, there is a table with the following headers: 'Carrier Name', 'Task Name', 'Changes Date Range', 'Task Type', and 'Processing/Er'. The table body is currently empty.

4. Select the applicable company:
 - If the task is created at the Organization level, select the company from the dropdown.
 - If the task is created at the Company level, the company information will automatically populate.

5. Select the carrier from the dropdown menu:

- For an existing carrier file implementation, select the carrier listed under the **Existing Carrier** section.
- For a new carrier file implementation, select the carrier from the available carrier list.

6. Select the **Eligibility Management Type** from the dropdown menu.

- The **Eligibility Management Task Type** will automatically default to **File Implementation** if the carrier is new.
- If the file implementation is for an existing carrier and the selected Eligibility Management Type differs from the current setup, the Eligibility Management Type will automatically update in the carrier details once the task is completed.

7. Enter the **File Implementation Name**.

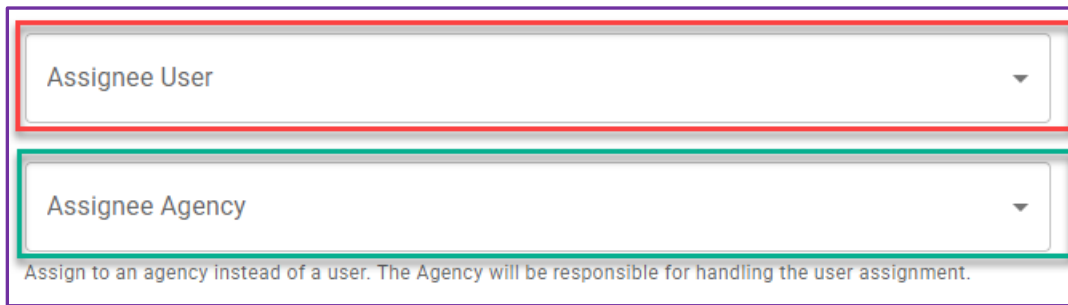
8. The **Task Creator** will automatically default to the user creating the task.

9. Select either an **Assignee** or an **Assignee Agency**.

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.

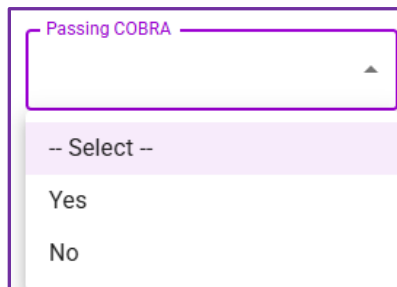
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.



Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.

10. Select whether the file is **Passing COBRA** by choosing Yes or No.



11. Enter the **Testing Carrier Contact Information**, including:

- Contact Name
- Email Address
- Phone Number

If multiple carrier contacts are needed or have been provided, additional contacts can be added within the carrier details after the carrier has been created in Streamline.

Testing Carrier Contact Name

Testing Carrier Contact Email

Testing Carrier Contact Phone

Additional carrier contacts can be added in Carrier Details once the carrier is created.

12. Complete the **Items Received Overview & Requirements** section.

All items are required for each Eligibility Management Type except **Enrollment Census** and **Audit Completed**. For **DEX (Data Exchange)** files, only the **Approved for Production Date** is required.

- **Structure** – Enter the date the structure was received.
- **Companion Guide** – Enter the date the companion guide was received.
- **FTP Credentials** – Enter the date the FTP credentials were received.
- **Enrollment Census** – Enter the date the enrollment census was received.
- **Audit Completed** – Enter the date the audit was completed.

Items Received Overview & Requirements

All File Management Types Except Data Exchange: All items except Enrollment Census and Audit Completed are required.

Data Exchange: The Date the file is approved for production is the only required field.

☐ Structure
 ☐ Companion Guide
 ☐ FTP Credentials
 ☐ Enrollment Census
 ☐ Audit Completed

13. Enter the date the **first test file** was sent.

- If additional test files are sent, document the additional dates and results in the comments section.

14. Enter the date the **file was approved for production**.

15. Enter the date the **first production file was sent**.

16. Select the **File Frequency** from the dropdown menu.

17. Select the **File Day of the Week** that the file is scheduled to be sent.

Date First Test Files Sent

Additional test file submission dates and results can be added in the comment section.

Date Approved For Production

Date First Production File Sent

File Frequency

File Day of the Week

18. Upload any applicable files.

19. Add comments as needed.

20. Enter any supplemental information.

21. Select **Create Task** to create the File Implementation task

Upload Files

ADD FILE

Comments

Please note the below supplemental information section may be overwritten. While the comments section above will lock the comment with the timestamp once submitted.

Supplemental Information

CREATE TASK

SAVE & COMPLETE TASK

BenOps: File Renewal

The File Renewal task within Eligibility Management Tasks provides a centralized workflow for managing the renewal of company files, including 834 EDI, Data Exchange, and Proprietary file types. By centralizing dates, documentation, and renewal activities, agencies gain better visibility into renewal progress, improve coordination with carriers, reduce the risk of missed steps, and maintain a complete history of each year's renewal process.

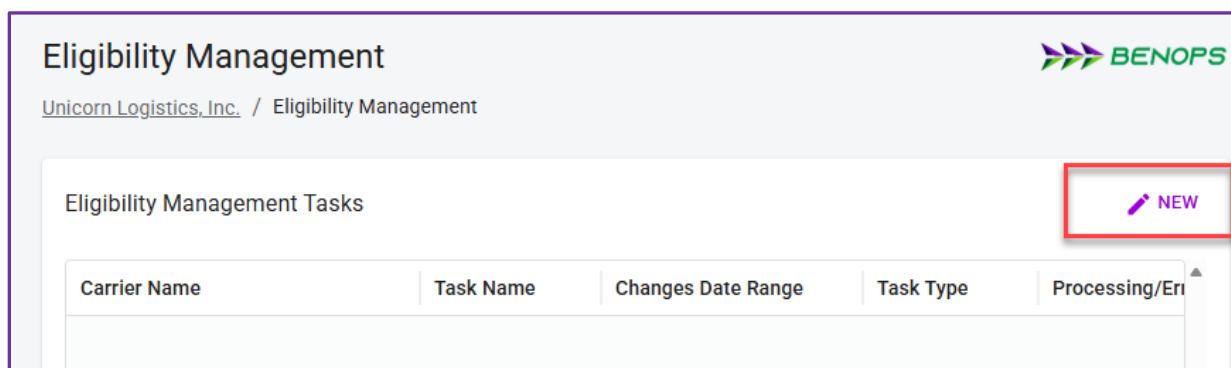
Who Does What?

GA (General Agent) → Starts the renewal, reviews/approves, enters testing details, closes task.

How It Works

Creating a File Renewal Eligibility Management Task

1. GA logs into the Streamline application.
2. Navigate to the applicable **Organization > Company** with the upcoming file renewal.
3. Under **Eligibility Management Tasks**, select **New**.

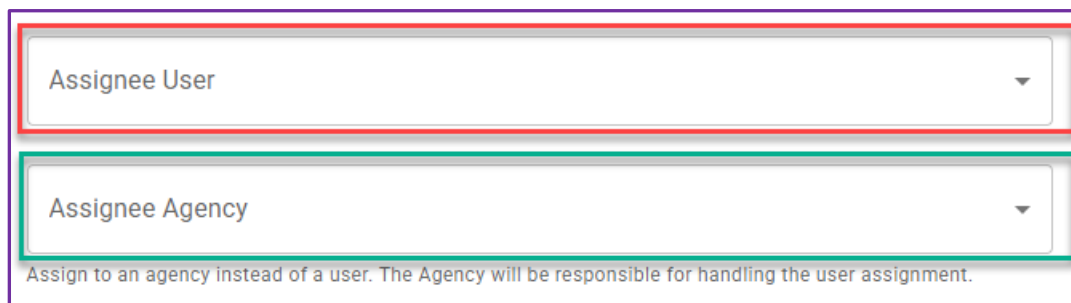


The screenshot shows the 'Eligibility Management' section of the application. At the top, it says 'Unicorn Logistics, Inc. / Eligibility Management'. Below this, there's a section titled 'Eligibility Management Tasks'. In the top right corner of this section, there is a red-bordered button with a purple pencil icon and the word 'NEW' in red. Below the button, there is a table with the following headers: 'Carrier Name', 'Task Name', 'Changes Date Range', 'Task Type', and 'Processing/Er'. The table is currently empty.

4. Select the applicable company: **(Required field to create)**
 - If the task is created at the Organization level, select the company from the dropdown.
 - If the task is created at the Company level, the company information will automatically populate.

5. Select the carrier from the dropdown menu:
 - Select the carrier listed under the **Existing Carrier** section - A renewal is only applicable to existing carriers. (Required field to create)
6. Select **File Renewal** from the **Eligibility Management Type** from the dropdown menu. (Required field to create)
7. Enter a descriptive **File Renewal Name**. As a best practice, include the renewal year and any other relevant information in the naming convention to make the renewal easy to identify. (Required field to create)
8. The **Task Creator** will automatically default to the user creating the task.
9. Select either an **Assignee** or an **Assignee Agency**.
 - **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
 - **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.



Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.

10. Complete the File Renewal Details & Requirements section once items have been received or completed:

Required to complete: Enrollment Start Date, Enrollment End Date, Administration End Date, Date OE Email Sent to Carrier, File Sent to Carrier, and Date File Processed Confirmed.

Optional: File Date Requested by Carrier, Structure and Mapping update dates, Termination Handling, and whether a post–open enrollment audit is required.

- Enrollment Start Date
- Enrollment End Date
- Administration End Date
- Date OE Email Sent to Carrier
- File Date Requested by Carrier
- File Sent to Carrier
- Structure Updates checkbox and Date Structure Received
- Mapping Updates Available checkbox and Date Mappings Updated
- Termination Handling dropdown:
 - 1. Term By Omission
 - 2. Send Terms on a Separate File
 - 3. Sent Termination File Only
 - 4. Term by Omission and Send Terms on a Separate File
- Is Post OE Audit Required: Yes or No
- Date File Processes Confirmed

11.Upload any applicable files.

12.Add comments as needed.

13.Enter any supplemental information.

14.Select **Create Task** to create the File Renewal task or **Save & Complete Task** when closing the task.

New Task

Supplemental Information

In Progress Task

Supplemental Information

BenOps: Client Renewal Wizard

The Client Renewal Wizard in the Streamline application is a shared workspace where a General Agent (GA) can start a group's renewal and collaborate with designated Organization contact(s) to complete the renewal information checklist—covering items such as Open Enrollment dates and plan details.

Who Does What?

GA (General Agent) → Starts the renewal, reviews/approves, enters testing details, closes task.

Organization Contacts → Provides client information, completes plans checklist, tests, and approves the renewal to Go Live.

How It Works

Step 1: GA Initiates a Renewal

- GA logs into the **Streamline application**.
- Navigate to the company with the upcoming renewal.
- Click **Carriers & Renewals** → **New** under the Renewal section.

The screenshot shows the Streamline application interface. On the left is a sidebar with a navigation menu. The 'Carriers & Renewals' option is highlighted with a red box. The main content area is divided into two sections: 'Carriers' and 'Renewals'. The 'Carriers' section contains a table with columns: Carrier, Group Number, Renewal Month, and Active. The 'Renewals' section contains a list of renewal tasks. A red box highlights the 'NEW' button in the top right corner of the Renewals section.

Carrier	Group Number	Renewal Month	Active
ADMIN AMERICA	7841	November	Yes
AMERITAS GROUP	AMG-123	December	Yes
ANTHEM BLUE CROSS BLUE SHIELD	9874	December	Yes
BLUE CROSS BLUE SHIELD	BC 784	November	Yes
BRIGHT BENEFITS	789522	January	Yes
LIBERTY UNION LIFE ASSURANCE C...	M987ZZ	November	Yes

Renewals:

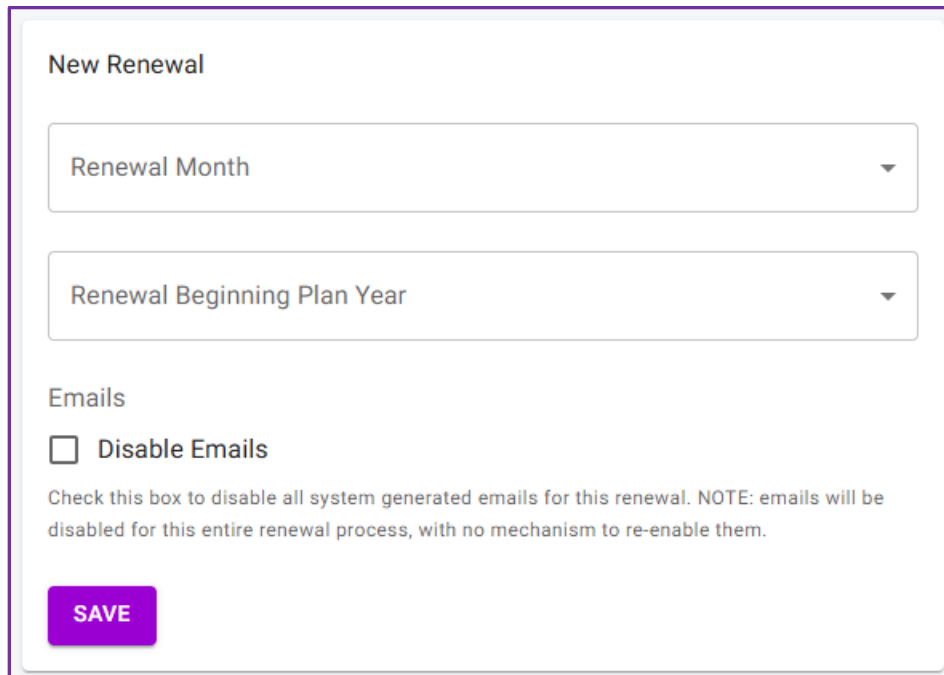
- 2025, January Client Information
- 2025, November Completed
- 2025, December Completed
- 2026, November Review Demo Environment
- 2026, December Live

- Select the **Renewal Month** and **Renewal Beginning Plan Year**,

- Select **Disable Emails** if the user does not want any system-generated emails sent for a specific renewal.

Please note: Once this option is selected, it cannot be changed. Emails will remain disabled for the duration of the renewal, and there is no option to re-enable them.

- Click **Save**.



The screenshot shows a web form titled "New Renewal". It contains two dropdown menus: "Renewal Month" and "Renewal Beginning Plan Year". Below these is a section titled "Emails" which includes a checkbox labeled "Disable Emails". A note below the checkbox states: "Check this box to disable all system generated emails for this renewal. NOTE: emails will be disabled for this entire renewal process, with no mechanism to re-enable them." At the bottom left of the form is a purple button labeled "SAVE".

- **IF DISABLE EMAILS IS NOT CHECKED**, an **automated email** notifies the designated Primary and Secondary Organization that a renewal has been created. The designated GA Renewal Contact will also receive this email.

BBS: Renewal Notification. You have been assigned to Full Stack Pancake Diner renewal: 2025, July. Please complete step: Client Information and Plans Checklist - Initial



notifications@dms-datavalidate.com

To: You



Thu 10/23/2025 9:46 AM

Hello [REDACTED]

The 2025, July renewal for your client, Full Stack Pancake Diner, is quickly approaching. To ensure their employee benefits enrollment portal is ready for re-enrollment, a few key steps require your attention.

Please [click here](#) to log in and complete both the Client Information and Renewal Plans Checklist.

Within the portal, you can upload all relevant plan materials, including (but not limited to) plan documents, rate sheets, and notes on any plan changes.

The client information and plans checklist should be completed at least 10 business days before your desired site open date. Updating plans for renewal, which also includes our internal QA process, takes approximately 5-7 business days. After our internal QA is complete, this allows an additional 1-2 business days for your review and feedback before the site is made available to employees.

We look forward to partnering with you to ensure a smooth and timely renewal for Full Stack Pancake Diner. If this request should be directed to another contact, please provide their information in the comments. We'll be happy to reassign the task accordingly.

Thank you,
on behalf of Mary Lanier, Broker Builder Solutions | Data Management Solutions



Note: Organization contacts and GA Renewal Contact can be found on the Company Detail page.

Information

EDIT

Company Name Fire Solutions Data Management	Organization Name Data Management Solutions: Testing
Comparisons Count 2	Users Count 3
Carriers Count 1	Active Yes
Primary Org Contact marytester (Mary Lanier)	Primary Org Contact Email
Primary Org Contact Phone	Secondary Org Contact
GA Renewal Contact mlanier (Mary Lanier)	GA Renewal Contact Email support@dms-datavalidate.com
Notes	

Step 2: Organization Completes Client Information

- The Organization will receive a Renewal Kickoff email outlining the next required actions. This email includes a link that, once logged into the application, allows the Organization user to easily access the renewal and begin **Step 1: Client Information**.
- If the Organization wants to take the lead instead of the GA, they can choose Broker Managed and assign an organization contact from the dropdown.
- The user will then complete the Required fields:
 - Enrollment Start Date** – date the open enrollment is open to the employees
 - Open Enrollment End Date** - date the open enrollment closes for the employee
 - Administration End Date** – date the open enrollment closes for admin users such as the HR team or Benefits Administrator
 - Enrollment Type (Active/Passive)**
- Optional (recommended) fields:

- COBRA Enrollment Type (Active/Passive)
- Passive Enrollment Button Enabled (Before, After, Both)
- Send Deductions Date (if payroll integration is present)
- Custom Enrollment Welcome & Email Language
- Enrollment Firm Fields – this is optional and applicable to those agencies that are also Enrollment Firms
 - Call Center – A simple **Yes/No** option that indicates whether the organization is requesting call center support for the enrollment.
 - Communication – Allows the user to specify how employee communications should be delivered via **text message**, **email**, or **both**
 - Census Add File – Allows the user to upload the census file that will be used for the selected communication option(s). This field is only available when a communication option has been selected.
- Comments – **Please note that a comment can be added without submitting the Client Information for GA Review. The comment can also be marked as an Internal Comment and restricted to GA user view only.**

Add a comment if you'd like to provide any additional context or information.

Paragraph ▼ | **B** *I* | ☰ ☷

☐ GA Internal Comment

- Close Renewal
- Click **Submit Client Information** → GA is notified for review.

Note: The **Close** and **Delete Renewal** options are available only on the **Client Information** step of the Renewal Wizard.

The **Close** option is designed for renewals marked as *Broker Managed*. It allows agents to close a renewal without completing the remaining steps, preventing any additional email notifications that would typically be triggered later in the process.

Once a renewal is closed:

- It will appear in the renewal list with a **Closed** status instead of **Completed**
- Only **Agency users** have permission to perform this action
- The renewal **cannot be reopened**

If a renewal was created in error, it can be deleted after being closed. Deleting a renewal will:

- Permanently remove it from the carrier page renewal list
- Prevent it from being recovered

Client Information

RESEND RENEWAL KICKOFF EMAIL

Last sent 7/7/2026. Notification count: 1.

Complete the form below to submit information for this renewal to the GA Renewal Contact for review.

Broker Managed Details

Enrollment Start Date

Enrollment End Date

Administration End Date

Enrollment Type

COBRA Enrollment Type

Passive Enrollment Button Enabled

Send Deductions Date

Applicable for payroll integrations

Enrollment Welcome Language

If welcome language varies by classification please specify for each

Enrollment Email Language

If email language varies by classification please specify for each

Enrollment Firm Fields

These fields apply only to Enrollment Firm agencies and are not required otherwise. For any questions, reach out to your dedicated enrollment firm contact.

Call Center

Communication

Census

The census file should be an excel or csv file inclusive of the Employees' First Name, Last Name, and either an Email Address or Phone Number, depending on the selected communication method.

No Census found.

ADD FILE

Comments

SKIP

SUBMIT CLIENT INFORMATION

CLOSE RENEWAL

Step 3: Organization Completes Plans Checklist

- For each listed plan click the **Plan Name** or **Status** to review:

Plans Checklist

Review each plan to confirm whether it is renewing. Within each plan, you may upload documents specific to that plan. If you would like to upload a document that applies to all plans, please do so in Step 3. If a plan is not renewing and a replacement plan needs to be added, adding a new plan is available in Step 2.

Steps to complete plans checklist:

- Plans Checklist** - Review each plan to confirm whether it is renewing. Within each plan, you may upload documents specific to that plan. If you would like to upload a document that applies to all plans, please do so in Step 3. If a plan is not renewing and a replacement plan needs to be added, adding a new plan is available in Step 2.
- Add New or Replacement Plans** - This step should only be used if you are adding a new plan that does not currently exist or if the plan is replacing an existing plan.
- Add Documents** - Use this step only to upload documents that are applicable to all plans.
- Post Comments** - If you have additional comments or specific information to communicate, add the information in the comments.
- Submit Plans Checklist** - Upon submission of the plans checklist, your renewal contact will receive an email notification and will begin the renewal setup in the Ben Admin system. You will receive an email once the setup is complete and ready for your review.

Plans Checklist

Plan Name	Carrier	Benefit Type	Status	Renewing?
HIGH PLAN	Delta Dental of NC	Dental	! IN PROGRESS	
MEDICAL OPTION 1	Anthem Blue Cross Blue Shield	Medical	! IN PROGRESS	

- If not renewing →
 - Select NO and add additional information to the General Plan Renewal Notes and/or Comments to indicate if the carrier is being replaced by another or any other pertinent information for the GA contact.
 - Click **Submit Plan Information** (status changes to Submitted).

Plan Name

2025 Dental High (Admin America)

Plan Details

Renewal Details

Is this plan renewing?

No

General Plan Renewal Notes

Comments

BACK

SUBMIT PLAN INFORMATION

- If **renewing** →
 - Answer additional questions for the rates, rounding, limits, contributions section, and the eligibility section.
- Upload supporting documents as needed
- Add additional pertinent information in the Comment section

Renewal Details

Is this plan renewing?

Yes

General Plan Renewal Notes

General Plan Documents

No General Plan Documents found.

ADD FILE

Are Rates, Rounding, Contributions, or Plan Limits Changing?

Rates, Rounding, Contributions, or Plan Limits Changing Notes

Rates, Rounding, Contributions, or Plan Limits Documents

No Rates, Rounding, Contributions, or Plan Limits Documents found.

ADD FILE

Is eligibility changing?

Eligibility Changing Notes

Eligibility Documents

No Eligibility Documents found.

ADD FILE

Comments

BACK
SUBMIT PLAN INFORMATION

- Click **SUBMIT PLAN INFORMATION** once all selections have been made for the specific plan.
- Repeat the process above for each plan listed until all statuses have been changed from IN PROGRESS to SUBMITTED.

Plan Name	Carrier	Benefit Type	Status	Renewing?
2026 DENTAL PLAN	Delta Dental of CA	Dental	✓ SUBMITTED	No
2026 MEDICAL PLAN HIGH OPTION	Cigna	Medical	! IN PROGRESS	
2026 VISION PLAN	Cigna	Vision	! IN PROGRESS	
GUARDIAN ENROLLMENT TO EN (VISION)	Access Health	Group ADD	! IN PROGRESS	

- If adding new or replacement plans →

- Click ADD NEW PLAN

Plan Name	Carrier	Benefit Type	Status	Renewing?
HIGH PLAN	Delta Dental of NC	Dental	! IN PROGRESS	
MEDICAL OPTION 1	Anthem Blue Cross Blue Shield	Medical	! IN PROGRESS	

1-2 of 2 < >

+ ADD NEW PLAN

- Select Carrier
- The Renewal Month will default to the current renewal month
- Add Plan Name
- Select Benefit Type and then SAVE

Add New Plan

Add a plan to the checklist. If this carrier has not been set up for this company yet, it will be created.

Carrier

Please [contact us](#) to add a carrier not in this list.

Renewal Month

Plan Name

Benefit Type

SAVE

CANCEL

- After clicking SAVE, the renewal details form will appear, complete all required fields using the same process above for: If **renewing** →
- **Plans Documents** includes an upload option for files that apply to all plans. This allows users to upload shared documents once, eliminating the need to upload the same file separately for each plan.
- Once all plans are submitted, add any applicable comments and then click **Submit Plans Checklist** → GA is notified by an email.

Plans Checklist

Plan Name	Carrier	Benefit Type	Status	Renewing?
EAP	90 Degree Benefits	Employee Assistance Program	✓ SUBMITTED	Yes
HIGH PLAN	Delta Dental of NC	Dental	✓ SUBMITTED	Yes
MEDICAL OPTION 1	Anthem Blue Cross Blue Shield	Medical	✓ SUBMITTED	No
1-3 of 3 < >				

+ ADD NEW PLAN

Plans Documents

Comments

SUBMIT PLANS CHECKLIST

Step 4: GA Reviews & Collaborates

- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.

GA Review Client Information – Approval

After the organization contacts have entered all required information, and no further details are needed, the GA should add any desired comments and then click **APPROVE CLIENT INFORMATION**.

The screenshot shows a form with a 'Comments' text area at the top. Below it are three buttons: 'SKIP' (grey), 'APPROVE CLIENT INFORMATION' (purple, highlighted with a green border), and 'REQUEST CHANGES' (red).

GA Review Client Information – Request Changes

If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts

The screenshot shows the same form as above. The 'REQUEST CHANGES' button (red) is highlighted with a red border.

GA Review Plans Checklist – Approval

For each listed plan, click the Plan Name or Status to review.

REQUEST CHANGES TO PLANS CHECKLIST

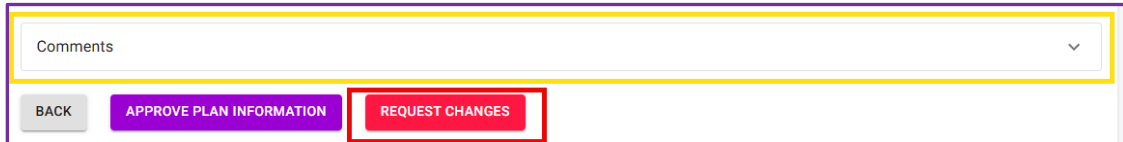
Plan Name	Carrier	Benefit Type	Status	Renewing?
2025 DENTAL HIGH	Admin America	Dental	! GA REVIEW	Yes
2025 MEDICAL OPTION 2-PPO PLAN	Admin America	Dental	! GA REVIEW	Yes

If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION**.

The screenshot shows a form with a 'Comments' text area at the top. Below it are three buttons: 'BACK' (grey), 'APPROVE PLAN INFORMATION' (purple, highlighted with a green border), and 'REQUEST CHANGES' (red).

- **GA Review Plans Checklist – Request Changes**

If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts



The screenshot shows a web interface for reviewing plans. At the top is a large text area labeled 'Comments' with a downward arrow on the right. Below this are three buttons: a grey 'BACK' button, a purple 'APPROVE PLAN INFORMATION' button, and a red 'REQUEST CHANGES' button. The 'REQUEST CHANGES' button is highlighted with a red border.

- When all plans have been approved, click **APPROVE PLANS CHECKLIST**.
- Collaboration continues until both steps are approved.

Steps 5 & 6: Testing & Go Live

Once the Client Information and Plans Checklist steps have been approved, the Demo Environment can be configured within the Benefit Administration System.

On Step 5, the General Agent enters the required testing details, including demo user information and any applicable instructions, in the Demo Environment Notes section.

If one or more Communication Options were selected during the Client Information step, the Communication Language section will become available for the General Agent to complete. Additional comments and supporting files can also be added as needed.

Once all required information has been entered, click **SUBMIT DEMO ENVIRONMENT INFORMATION** to complete this step.

GA Setup Demo Environment

Please provide the demo environment information below and submit it for review by the Organization Contacts.

Demo Environment Notes

Communication Language

The General Agent (GA) or enrollment firm provides the communication language that will be used in the text message and/or email communications sent to employees. The organization must review and approve this language prior to use. If this communication option does not apply to the enrollment firm, it can be disregarded.

Comments

SUBMIT DEMO ENVIRONMENT INFORMATION

- Organization is notified by automated email and begins testing in the **Benefit Administration System**.
- Request Changes:
 - If changes are needed, the Organization user will add a comment and/or files requesting the change to the Benefit Administration system and click **Request Change**.
- After successful testing:
 - Organization checks all acknowledgment boxes if all testing was successful.
 - Clicks **Go Live** (button activates only when all boxes are checked).

Review Demo Environment

The Organization Contacts will review the submitted demo environment information below and either approve or request changes.

Demo Environment Information

Demo Environment Notes

Demo users:
username: Demo
password: Testing

Please check that all plans are visible with correct rates.

Communication Language

Communication language can be added here by the General Agent

The General Agent (GA) or enrollment firm provides the communication language that will be used in the text message and/or email communications sent to employees. The organization must review and approve this language prior to use. If this communication option does not apply to the enrollment firm, it can be disregarded.

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- ☐ Are the benefit plans associated with each class and/ or business unit showing in the open enrollment engine?
- ☐ Do ALL employee per pay deductions reflect as expected in the open enrollment engine (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- ☐ Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- ☐ Do all plan documents associated with each plan reflect as expected?
- ☐ Does all communication language reflect as expected?
- ☐ Are all onboarding/employee tasks showing as expected (if applicable)?
- ☐ Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE

REQUEST CHANGES

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- ☒ Are the benefit plans associated with each class and/ or business unit showing in the open enrollment engine?
- ☒ Do ALL employee per pay deductions reflect as expected in the open enrollment engine (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- ☒ Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- ☒ Do all plan documents associated with each plan reflect as expected?
- ☒ Does all communication language reflect as expected?
- ☒ Are all onboarding/employee tasks showing as expected (if applicable)?
- ☒ Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE

REQUEST CHANGES

Step 7: Renewal Completion

- Once live, the renewal is **locked**—previous steps cannot be reopened.
- Post-Go Live:

Organization Contacts: The renewal is complete, and no further action is required. However, if changes are requested after the renewal has gone live, the organization may still add comments or upload documents linked to specific plans.

Renewal: 2025, October

[Fire Solutions Data Management](#) / [Renewals](#) / 2025, October - Live

☒ Client Information

☒ Plans Checklist

☒ GA Review Client Information

☒ GA Review Plans Checklist

☒ GA Setup Demo Environment

☒ Review Demo Environment

☒ Live

Live

This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this renewal, please submit a comment with this information below.

Comments

Client Information ✓ Plans Checklist ✓ GA Review Client Information ✓ GA Review Plans Checklist ✓ GA Setup Demo Environment ✓ Review Demo Environment ✓ Live ✓

Live

This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this renewal, please submit a comment with this information below.

Comments

Add a comment if you'd like to provide any additional context or information.

Paragraph ▾ | **B** *I* | |

If this comment applies to a particular Plan please select it below.

Plan ▾

Attachments

ADD FILE

SUBMIT COMMENT

- GA closes the renewal task in the system. Please notice that the **Complete & Close Task** is only available on the GA Contact access.

Renewal: 2025, October

[Fire Solutions Data Management](#) / [Renewals](#) / 2025, October - Live

Client Information ✓ Plans Checklist ✓ GA Review Client Information ✓ GA Review Plans Checklist ✓ GA Setup Demo Environment ✓ Review Demo Environment ✓ Live ✓

Live

This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this renewal, please submit a comment with this information below.

Comments ▾

COMPLETE & CLOSE TASK

- A **final closeout email** is sent, marking the renewal complete and ready for the next cycle.

✓ With this new Renewal Wizard, GAs and Organizations have a streamlined, collaborative, and transparent process to ensure smooth renewals every year.

Companies Table for Renewals

We've added a new feature to the Companies table at the organization level. A new column now displays whether a company has an active renewal in progress.

The screenshot shows the Streamline application interface. On the left is a sidebar with navigation options: Agency, ORGANIZATION (highlighted with a red box), BB (Broker B: Data Management Solutions), Companies (highlighted with a red box), Comparisons, Mappings, Templates, Reports, Eligibility Management, and Users. Below these is a 'COMPANY' section with a 'Select a Company' button. The main area is titled 'Companies' and shows a table with the following columns: Company Name, In Renewal (highlighted with a red box), Org Contact 1, and Org Contact 2. The table lists several companies, with green checkmarks in the 'In Renewal' column for ABC COMPANY, A TOUCH OF PINK BAKERY, BRITTANY DEMO, CARLA DEMO, and DECEMBER DEMO COMPANY. Inactive companies like CAULIFLOWER TESTING and CITY OF BRIDGERTON are also listed. The table has a pagination bar at the bottom right showing '1-8 of 29'.

Company Name	In Renewal	Org Contact 1	Org Contact 2
ABC COMPANY	✓	malanier2024	malanier2024
A TOUCH OF PINK BAKERY	✓	malanier2024	
BRITTANY DEMO	✓	brokerverifier	
CARLA DEMO	✓	brokerverifier	
CAULIFLOWER TESTING (INACTIVE)			
CITY OF BRIDGERTON (INACTIVE)			
DECEMBER DEMO COMPANY	✓	brokerverifier	
DEMO COMP-08082024 (INACTIVE)			

Eligibility Management Tracking

The Eligibility Management Tracking module is designed to streamline and record all manual enrollment handling activities. This module supports tracking for recurring eligibility management, open enrollment (OE) manual processing, carrier error reports, and issues related to carrier files.

To ensure complete visibility, users can log the method of processing, timeframes, assigned staff, and relevant enrollment counts.

Creating a new Eligibility Management Task is straightforward, but there are a few rules to keep in mind. **All task types can be created by an Agency User** and may be created at **three levels**:

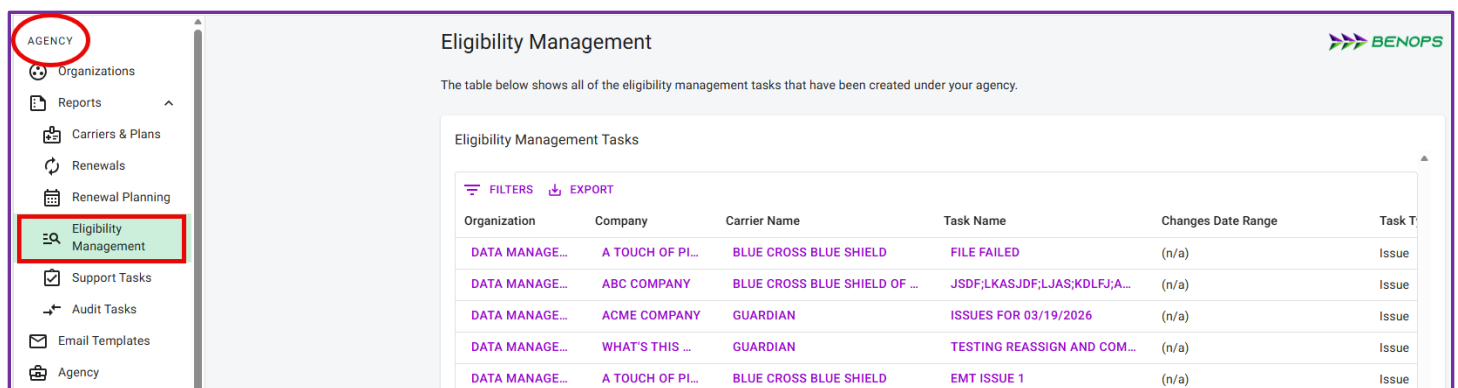
- **Organization level**
- **Company Level**
- **Company Carrier level**

However, Organization users now have the ability to create an Issue Type that is automatically assigned to the Agency default email address.

Tasks **cannot** be created at the Agency level, although they **can be viewed and exported** there.

Eligibility Management Tracking Tables:

Agency:



Eligibility Management

The table below shows all of the eligibility management tasks that have been created under your agency.

Organization	Company	Carrier Name	Task Name	Changes Date Range	Task Type
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	FILE FAILED	(n/a)	Issue
DATA MANAGE...	ABC COMPANY	BLUE CROSS BLUE SHIELD OF ...	JSDF;LKASJDF;LJAS;KDLFJ;A...	(n/a)	Issue
DATA MANAGE...	ACME COMPANY	GUARDIAN	ISSUES FOR 03/19/2026	(n/a)	Issue
DATA MANAGE...	WHAT'S THIS ...	GUARDIAN	TESTING REASSIGN AND COM...	(n/a)	Issue
DATA MANAGE...	A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	EMT ISSUE 1	(n/a)	Issue

Organization:

ORGANIZATION

DM

Data Management Solutions

Companies

Comparisons

Mappings

Templates

Reports

Tasks

Eligibility Management

Support Tasks

Audit Tasks

Users

Eligibility Management

Data Management Solutions / Eligibility Management

Eligibility Management Tasks

NEW

FILTERS

EXPORT

Company	Carrier Name	Task Name	Changes Date Range	Task Type
A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	FILE FAILED	(n/a)	Issue
ABC COMPANY	BLUE CROSS BLUE SHIELD OF ...	JSDF;LKASJDF;LJAS;KDLFJ;A...	(n/a)	Issue
ACME COMPANY	GUARDIAN	ISSUES FOR 03/19/2026	(n/a)	Issue
WHAT'S THIS ...	GUARDIAN	TESTING REASSIGN AND COM...	(n/a)	Issue
A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	EMT ISSUE 1	(n/a)	Issue
A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	ISSUE !@##\$	(n/a)	Issue
A TOUCH OF PI...	BLUE CROSS BLUE SHIELD	TESTING 03.17.2026	(n/a)	Issue

Company:

DM

Data Management Solutions

Companies

Comparisons

Mappings

Templates

Reports

Tasks

Users

COMPANY

AT

A Touch of Pink Bakery

Comparisons

Mappings

Templates

Carriers & Renewals

Tasks

Eligibility Management

Support Tasks

Audit Tasks

Convert Carrier Files

Users

Eligibility Management

A Touch of Pink Bakery / Eligibility Management

Eligibility Management Tasks

NEW

FILTERS

EXPORT

Carrier Name	Task Name	Changes Date Range	Task Type	Processing/Er...
BLUE CROSS BLUE SHIELD	FILE FAILED	(n/a)	Issue	File Transmiss
BLUE CROSS BLUE SHIELD	EMT ISSUE 1	(n/a)	Issue	File Transmiss
BLUE CROSS BLUE SHIELD	ISSUE !@##\$	(n/a)	Issue	File Structure U
BLUE CROSS BLUE SHIELD	TESTING 03.17.2026	(n/a)	Issue	File Transmiss
BLUE CROSS BLUE SHIELD	OR USER 03.17.2026	(n/a)	Issue	File Structure U
BLUE CROSS BLUE SHIELD	SKLDFJALKSJDFKLASJDFLKA...	(n/a)	Issue	File Transmiss
BLUE CROSS BLUE SHIELD	WHAT IN THE WORLD!!!	(n/a)	Issue	
BLUE CROSS BLUE SHIELD	BCBS FILE ERROR	(n/a)	Issue	File Transmiss

1-8 of 25

Company Carrier Level:

Alliant Health Plan
ABC Company / Carriers / Alliant Health Plan

Carrier Information [EDIT](#)

Carrier	Alliant Health Plan	Group Number	98741252
Renewal Month	October	Renewal Kickoff Days In Advance	45
Carrier Invoice Day Of Month	15	Eligibility Management Type	Agency (O) Managed Manual Eligibility
Carrier Inception Date	1/1/2015	Disable Renewals	Yes
Active	Yes	Audit Service	No
GA Eligibility Contact	gaagent (GA Agent)	GA Eligibility Contact Email	gaagent25@gmail.com
GA Audit Contact		GA Audit Contact Email	

Carrier Plans [ADD A NEW PLAN](#)

[FILTERS](#) [EXPORT](#)

Plan Name	Benefit	Eligibility Management Type
2025-2026 PLAN 2	Vision	Agency (O) Managed Manual ...
2027 PLAN YEAR MEDICA...	Medical	Agency (O) Managed Manual ...

1-2 of 2

Eligibility Management Tasks [NEW](#)

[FILTERS](#) [EXPORT](#)

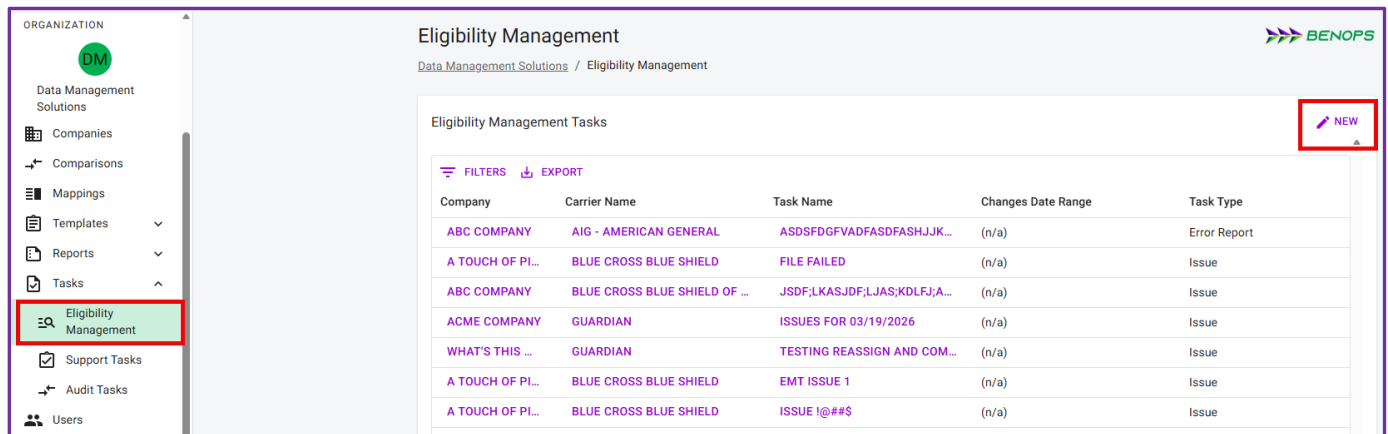
Task Name	Changes Date Range	Task Type	Processing/Error/Issue Type	Assign
ALLINANT OE CHANGES FOR ...	(n/a)	Open Enrollment Processing		tester...
ABC COMPANY: SUPERIOR VI	(n/a)	Error Report		tester...

The fields presented will vary slightly depending on where the task is created and what task and issue type is selected.

- When created at the **organization level**, you will need to manually select both the company and the carrier.
- When created at the **company level**, the company is pre-populated for you.
- When created at the **company carrier level**, the company and carrier information is pre-populated for you.

How It Works

1. **Navigate to the organization or company** where the task will be created.
2. Select **Eligibility Management** from the left menu under **TASKS**, then click **NEW**.



Eligibility Management

Data Management Solutions / Eligibility Management

Eligibility Management Tasks

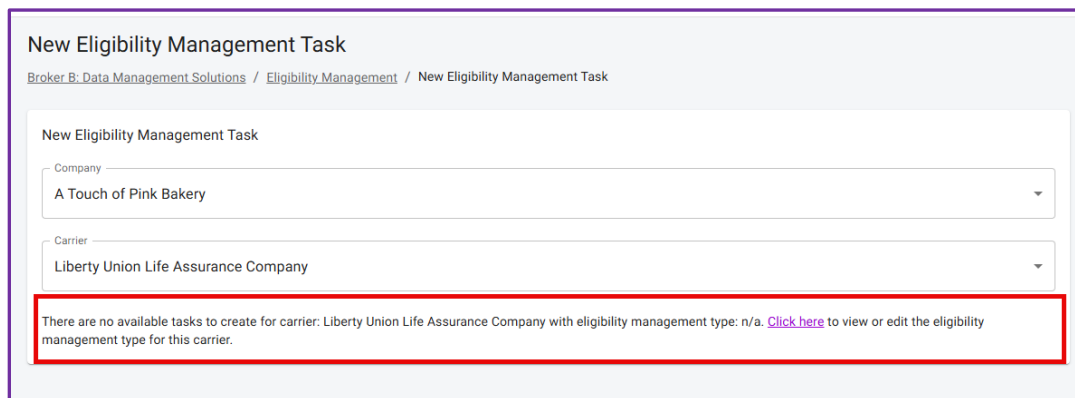
[NEW](#)

Company	Carrier Name	Task Name	Changes Date Range	Task Type
ABC COMPANY	AIG - AMERICAN GENERAL	ASDSFDGFDASDFASDJJK...	(n/a)	Error Report
A TOUCH OF PL...	BLUE CROSS BLUE SHIELD	FILE FAILED	(n/a)	Issue
ABC COMPANY	BLUE CROSS BLUE SHIELD OF ...	JSDF;LKASJDF;LJAS;KDLFJ;A...	(n/a)	Issue
ACME COMPANY	GUARDIAN	ISSUES FOR 03/19/2026	(n/a)	Issue
WHAT'S THIS ...	GUARDIAN	TESTING REASSIGN AND COM...	(n/a)	Issue
A TOUCH OF PL...	BLUE CROSS BLUE SHIELD	EMT ISSUE 1	(n/a)	Issue
A TOUCH OF PL...	BLUE CROSS BLUE SHIELD	ISSUE !@##\$	(n/a)	Issue

Company & Carrier Selection

- Choose the **company** from the dropdown if creating on the organization level. If the task is created on company level, the company will be preselected.
- Choose the **carrier** for that company.

If you see the highlighted message indicating the eligibility type is not supported, the type must be updated before a task can be created. This typically indicates that the field is blank.



New Eligibility Management Task

Broker B: Data Management Solutions / Eligibility Management / New Eligibility Management Task

New Eligibility Management Task

Company
A Touch of Pink Bakery

Carrier
Liberty Union Life Assurance Company

There are no available tasks to create for carrier: Liberty Union Life Assurance Company with eligibility management type: n/a. [Click here](#) to view or edit the eligibility management type for this carrier.

Select the Eligibility Management Task Type

Choose from the dropdown:

- Recurring Enrollment Processing** – for tasks performed on a set schedule (e.g., weekly updates).
- Open Enrollment Processing** – for tasks related to once-per-plan-year OE changes.
- Error Report** – for tasks related to error reports received from carriers as a result of submitted files.
- Issue** – for tasks related to carrier files such as file transmissions, or file mapping issues

5. **File Implementation** – for new carrier implementations
6. **File Renewal** – for carrier renewals

New Eligibility Management Task



[Pickles For Profits](#) / [Eligibility Management](#) / New Eligibility Management Task

New Eligibility Management Task

Company

Pickles For Profits

Carrier

Guardian

Eligibility Management Task Type

Recurring Enrollment Processing
Open Enrollment Processing
Error Report
Issue
File Implementation
File Renewal

Required Fields for Creating an Enrollment Processing Task

NAME: Enter a unique task name (required per company).

Best practice is to include both the **carrier's name** and the **date range** of the changes or other information to create a unique name that is not repeatable for the specific company. Examples:

- *Blue Cross: Weekly 12/15/25 – 12/21/25*
- *Blue Cross: November 2025 OE*

TASK CREATOR: Will default to the user creating task and cannot be changed.

ASSIGNEE or an **ASSIGNEE AGENCY:**

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.

Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.

The assigned user or agency will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly assigned user will also receive an email notification.

CHANGES FROM DATE: Enter or select the beginning date of the change window.

Example: For changes from 12/15/2025 to 12/21/2025, the “From Date” is **12/15/2025**.

CHANGES TO DATE: Enter or select the ending date of the change window.

Example: **12/21/2025**

***** If open enrollment changes, the changes from and to ARE OPTIONAL. However, it is recommended to use the first day of the new plan year. Example: November 2025 open enrollment will reflect 11/01/2025 as both the from and to date.**

Name
Task Creator maryl (Mary Lanier)
Assignee
Changes From Date
Changes To Date

Changes Source Type: Select how the changes are determined.

Manual Processing Type

Choose how the changes were processed:

1. **Carrier Portal** – changes keyed directly in the carrier portal
2. **Email** – changes submitted in the body of an email
3. **Spreadsheet** – changes submitted via an attached spreadsheet
4. **Benefits Administration Portal** – changes submitted in Benefits Administration Portal
5. **Proprietary File** – changes submitted via a proprietary file
6. **Other** – any method not covered above

Carrier Portal
Email
Spreadsheet
Benefits Administration Portal
Proprietary File
Other

Required Counts for Completion:

These fields are required for all processing types.

The task may be saved with these fields blank, but **cannot be completed** until they are filled in.

1. **Changed Enrollment Count** – number of enrollment changes; enter **0** if none
2. **Verified Enrollment Count** – number of items verified; enter **0** if none
3. **Demographic Changes Count** – number of demographic-only changes; enter **0** if none

Additional Required Fields for Completion (If Processing Type is NOT Carrier Portal):

- **Processing Submitted Date** – date changes were sent to the carrier or responsible party
- **Processing Confirmed Date** – date confirmation was received that changes were processed

If a spreadsheet was used, upload it via **ADD FILES**.

Upload Files

 **ADD FILE**

Required Fields for Creating an Error Report Task

NAME: Enter a unique task name (required per company).

Best practice is to include both the **carrier's name** and the **date range** of the changes or other information to create a unique name that is not repeatable for the specific company.

Examples:

- *Blue Cross: Weekly 12/15/25 – 12/21/25*
- *Blue Cross: November 2025 OE*

TASK CREATOR: Will default to the user creating task and cannot be changed.

ASSIGNEE or an **ASSIGNEE AGENCY**.

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.

Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.

The assigned user or agency will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly assigned user will also receive an email notification.

Additional Required Fields for Completion:

ERROR REPORT RECEIPT TYPE: Select how the error report was provided.

ERROR REPORT RECEIVED DATE: Select when the error report was received.

ERROR RECEIVED: Select Yes or No to indicate that the carrier error report contained errors.

Processing Submitted Date – date error resolutions were sent to the carrier or responsible party

Processing Confirmed Date – date error resolution confirmation was received

Processing Submitted Date

Processing Confirmed Date

If a spreadsheet was used, upload it via **ADD FILES**.

Upload Files

ADD FILE

Required Fields for Creating an Issue Task

NAME: Enter a unique task name (required per company).

Best practice is to include both the **carrier's name** and the **date of the issue** or other information to create a unique name that is not repeatable for the specific company.

TASK CREATOR: Will default to the user creating task and cannot be changed.

ASSIGNEE OR ASSIGNEE AGENCY: Select the user or agency responsible for completing the task.

ISSUE TYPE: Select the issue for this task.

If supporting files or documentation is available, upload it via **ADD FILES**.

Upload Files

ADD FILE

Final Steps for all Task Types

- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **SAVE** or **SAVE & COMPLETE TASK**.

The **SAVE & COMPLETE TASK** button becomes enabled only when all required fields are completed based on the selected processing type.

Upload Files

 ADD FILE

Notes

SAVE

SAVE & COMPLETE TASK

Important Notes

- A completed task can be reopened if necessary.

RE-OPEN TASK

DELETE

- A completed task can be deleted but ONLY by an agency user.
- The deletion is permanent and the task cannot be restored!***

Notes

SAVE

SAVE & COMPLETE TASK

DELETE

Support Tasks

The Support Task module is designed to streamline and to provide a structured way to manage requests that fall outside of Eligibility Management Tasks.

This module allows both **Organization** and **Agency** users to create support tasks for a selected Company, with optional selection of a **Carrier** and **Carrier Plan**, along with a defined **Task Type**. Available task types include:

- Plan Build
- Broker Support
- HR Support
- ACA
- Compliance
- Reporting
- Post Renewal
- Import Issue
- Renewal Notes
- Post Implementation
- Implementation Notes
- Client Termination
- Plan Build Change
- Other

The Support Task module is designed to capture and track items that are not related to recurring enrollment processing, open enrollment, error reports, or issue workflows—helping improve organization and visibility of support-related activities.

Organization User Access

Organization users with **Admin, Comparer, or Task access** can create Support Tasks to log non-enrollment-related requests. When creating a task, Organization users can select the task type but **cannot assign the task**.

Instead, the task is automatically routed to the Agency's designated support email, as defined on the **Agency Detail** page.

Agency User Access

Once a Support Task is created, **Agency users** can review and reassign the task as needed. This ensures proper routing, ownership, and follow-up.

Benefits

- Centralizes support-related requests within the platform
- Improves visibility and tracking of non-enrollment tasks
- Enhances accountability and communication between organizations and agencies

Examples

Common uses for Support Tasks include:

- Submitting an ACA-related question
- Reporting an incorrect plan build
- Requesting general broker or HR support

The fields presented will vary slightly depending on where the task is created and what task and issue type is selected the same as the Eligibility Management tasks from earlier.

- When created at the **organization level**, you will need to manually select both the company and the carrier (optional).
- When created at the **company level**, the company is pre-populated for you.
- When created at the **company carrier level**, the company and carrier information is pre-populated for you.

How It Works

1. **Navigate to the organization or company** where the task will be created.
2. Select **Support Tasks** from the left menu under **TASKS**, then click **NEW**.

Support Tasks

Data Management Solutions / Support Tasks

Support Tasks

[NEW](#)

[FILTERS](#) [EXPORT](#)

Company	Carrier Name	Plan Name	Task Name	Task Type	Assign
A TOUCH OF PL...	(n/a)	(n/a)	NEW TASK ADDED	Plan Build	ima_aq
A TOUCH OF PL...	BLUE CROSS BLUE SHIELD	(n/a)	INCORRECT MAPPING FOR FU...	Plan Build	
A TOUCH OF PL...	BLUE CROSS BLUE SHIELD	Blue Options Plan 1	INCORRECT MAPPING FOR FU...	Plan Build	gaager
A TOUCH OF PL...	(n/a)	(n/a)	SUPPORT TASK -REPORTING	Reporting	dmsag
A TOUCH OF PL...	(n/a)	(n/a)	PLAN BUILD SUPPORT TASK	Plan Build	dmsag
A TOUCH OF PL...	(n/a)	(n/a)	JFALKJDFL;KAJSDFKL;AJSD;K...	Broker Support	ima_aq
A TOUCH OF PL...	(n/a)	(n/a)	CREATE A NEW REPORT FOR ...	Reporting	gaager
A TOUCH OF PL...	SOLSTICE	(n/a)	CREATING SUPPORT TASK AS ...	Other	

1-8 of 19

3. Company & Carrier Selection

- Choose the **company** from the dropdown if creating on the organization level. If the task is created on company level, the company will be preselected.
- OPTIONAL: Choose the **carrier** for that company.

New Support Task

Data Management Solutions / Support Tasks / New Support Task

New Support Task

Company

A Touch of Pink Bakery

Carrier (Optional)

Task Type

4. Task Type

- Select **task type** from the dropdown.

Required Fields for Creating a Support Task

NAME: Enter a unique task name (required per company).

TASK CREATOR: Will default to the user creating task and cannot be changed.

ASSIGNEE or an **ASSIGNEE AGENCY**.

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.

Assignee User

Assignee Agency

Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.

The assigned user or agency will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly assigned user will also receive an email notification.

If supporting files or documentation is available, upload it via **ADD FILES**.

Upload Files

ADD FILE

Final Steps for all Task Types

- Add any relevant details in the Comments and/or Supplemental Information sections.
- Click **CREATE TASK** or **SAVE & COMPLETE TASK**.

The **SAVE & COMPLETE TASK** button becomes enabled only when all required fields are completed based on the selected processing type.

Supplemental Information

CREATE TASK SAVE & COMPLETE TASK

Important Notes

- A completed task can be reopened if necessary.

RE-OPEN TASK DELETE

- A completed task can be deleted but ONLY by an agency user.
- The deletion is permanent and the task cannot be restored!**

Notes

SAVE SAVE & COMPLETE TASK DELETE

Audit Tasks

The **Audit Task** module is designed to streamline the creation and management of audit-related tasks. Users can upload up to **three files** to support the audit process, allowing for a more efficient and organized workflow.

Audit Tasks are available with all subscription plans.

Once an Audit Task is created:

- The system automatically generates the associated **comparison** for the assigned user
- This reduces manual setup and simplifies the audit process

When an Audit Task is created by an **Organization user**:

- The task is automatically assigned to the **designated Agency Support Email**
- **Agency users** can reassign the task as needed to ensure proper ownership and workflow management

After the comparison is completed:

- **Agency users** can close the Audit Task directly within the audit

How It Works

1. **Navigate to the organization or company** where the task will be created.
2. Select **Audit Tasks** from the left menu under **TASKS**, then click **NEW**.

Audit Tasks

Data Management Solutions / Audit Tasks

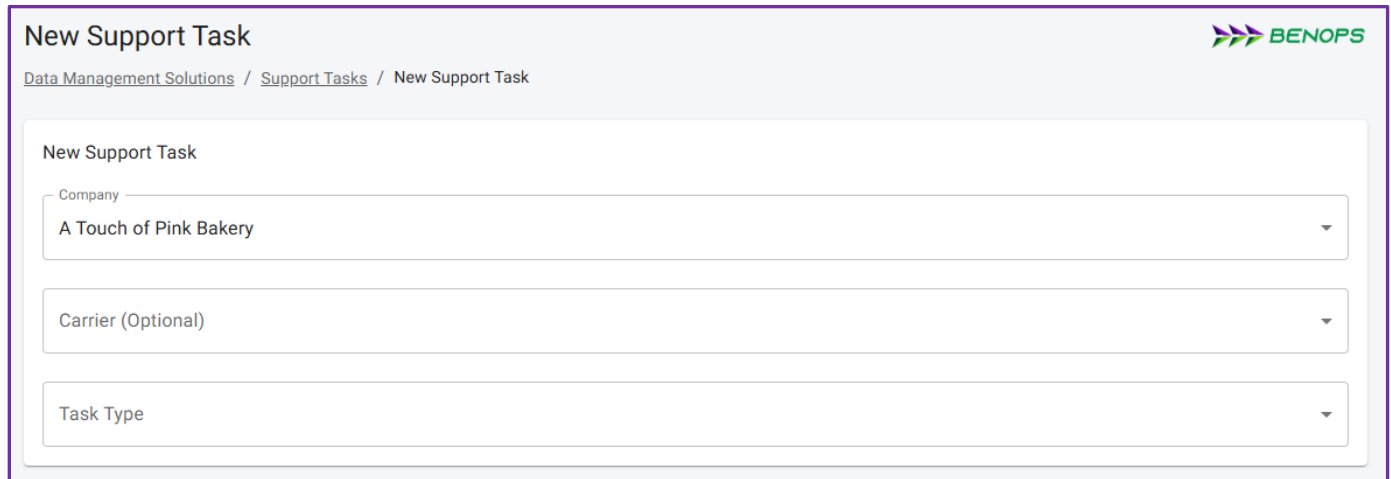
Audit Tasks

FILTERS **EXPORT**

Company	Carrier Name	Task Name	Comparison	Comparison Step
A TOUCH OF PL...	BLUE CROSS BLUE SHIELD	BCBS TO EN INVOICE JULY 20...	BCBS TO EN INVOICE JULY 20...	Import Data
A TOUCH OF PL...	GUARDIAN	GUARDIAN INVOICE MARCH 2...	GUARDIAN INVOICE MARCH 2...	Complete
A TOUCH OF PL...	BLUE CROSS BLUE SHIELD	AUDIT TASK	AUDIT TASK	Complete
ABC COMPANY	(n/a)	AUDIT FOR TESTING EMAIL	AUDIT FOR TESTING EMAIL	Import Data
TACOS PIZZA J...	(n/a)	AUDIT AS AGENCY USER	AUDIT AS AGENCY USER	Import Data
TACOS PIZZA J...	DELTA DENTAL OF HI	GENERAL AS ORG TASK COMP	GENERAL AS ORG TASK COMP	Import Data
TACOS PIZZA J...	DELTA DENTAL OF HI	GENERAL AUDIT	GENERAL AUDIT	Import Data

3. Company & Carrier Selection

- Choose the **company** from the dropdown if creating on the organization level. If the task is created on company level, the company will be preselected.
- OPTIONAL: Choose the **carrier** for that company.



New Support Task

[Data Management Solutions](#) / [Support Tasks](#) / [New Support Task](#)

New Support Task

Company
A Touch of Pink Bakery

Carrier (Optional)

Task Type

4. Audit Type

- a. Select from the dropdown:
- General Audit
 - Enrollment Audit
 - Post Open Enrollment Audit
 - Pre-Production Audit
 - Post Production Audit
 - Invoice Reconciliation
 - Other

Required Fields for Creating an Audit Task

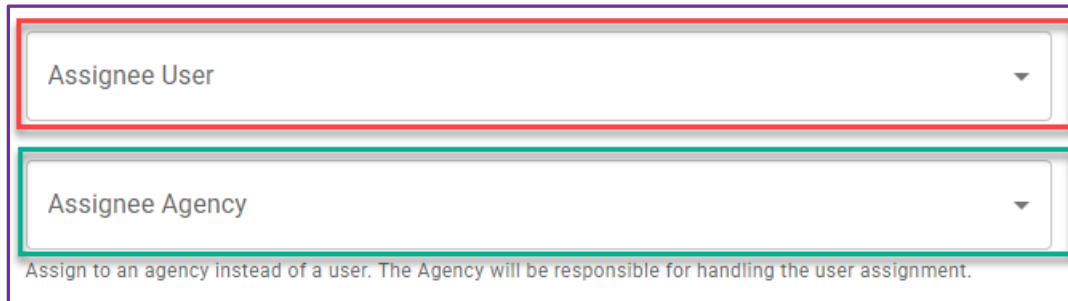
NAME: Enter a unique task name (required per company).

TASK CREATOR: Will default to the user creating task and cannot be changed.

ASSIGNEE or an **ASSIGNEE AGENCY**.

- **Assignee:** Select an individual user from the dropdown menu. The list includes applicable users from the Agency Administrator connected to the Organization.
- **Assignee Agency:** Select from the agencies connected to the Organization. When an agency is selected, notifications are automatically sent to the agency's default support email address.

Only one assignment type can be selected at a time—either an individual user or an agency.

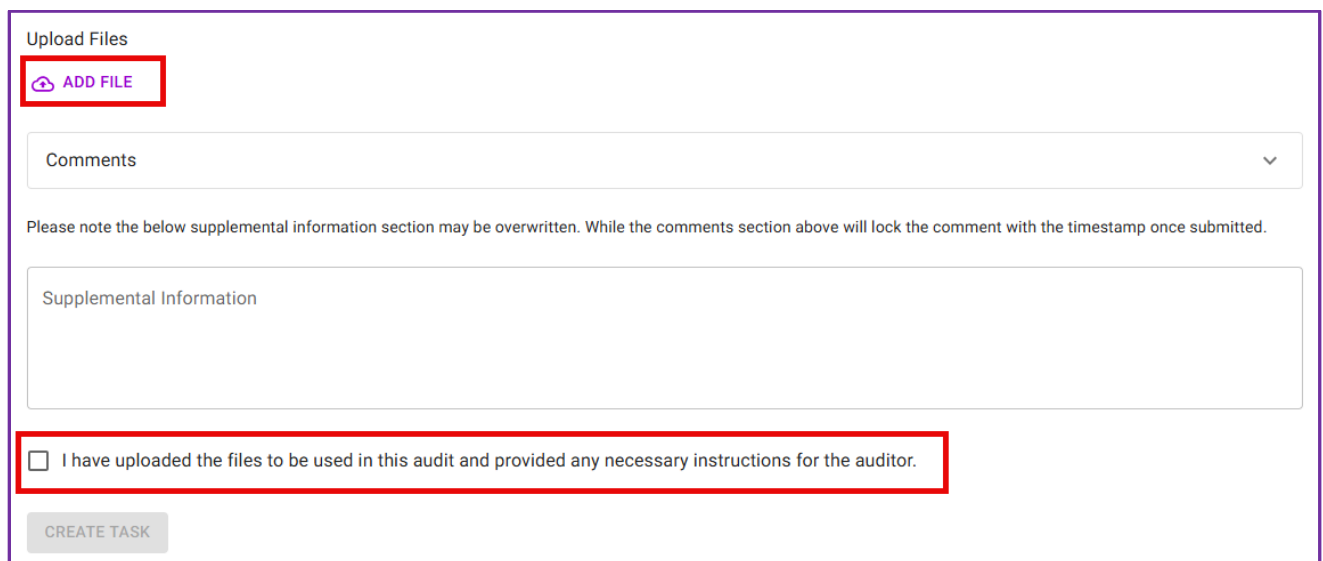


The image shows two dropdown menus. The first dropdown is labeled 'Assignee User' and the second is labeled 'Assignee Agency'. Below the second dropdown, there is a note: 'Assign to an agency instead of a user. The Agency will be responsible for handling the user assignment.'

The assigned user or agency will receive an email notification indicating that a new task has been assigned to them, along with a direct link to the task so they can access it without navigating through the application. If the assignee is changed after the task has been created—but before it is completed—the newly assigned user will also receive an email notification.

If supporting files or documentation are available, they can be uploaded using the **ADD FILES** option.

Please note: If the Audit Task is created by an **Organization user**, all supporting files must be uploaded during the task creation process.



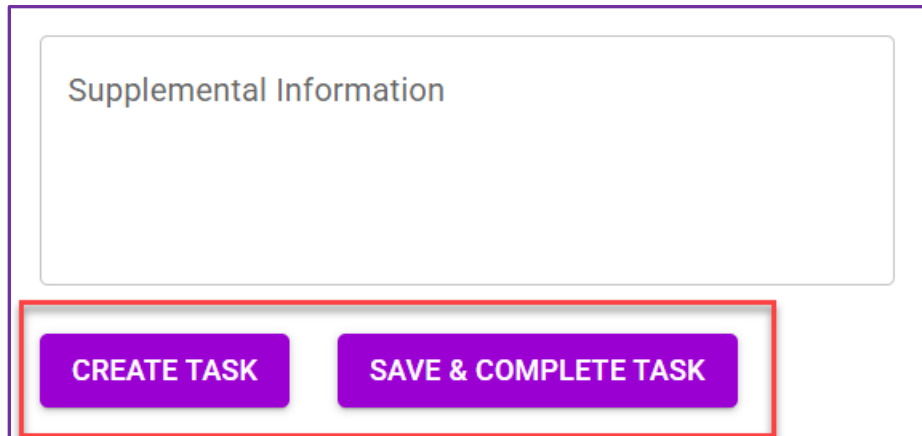
The image shows a form for creating a task. It includes an 'Upload Files' section with an 'ADD FILE' button. Below this is a 'Comments' section with a dropdown arrow. A note states: 'Please note the below supplemental information section may be overwritten. While the comments section above will lock the comment with the timestamp once submitted.' Below the note is a 'Supplemental Information' section. At the bottom, there is a checkbox labeled 'I have uploaded the files to be used in this audit and provided any necessary instructions for the auditor.' and a 'CREATE TASK' button.

Final Steps for all Task Types

- Add any relevant details in the Comments and/or Supplemental Information sections.

- Click **CREATE TASK** or **SAVE & COMPLETE TASK**.

The **SAVE & COMPLETE TASK** button becomes enabled only when all required fields are completed based on the selected processing type and only for an Agency user.



The screenshot shows a user interface for creating a task. It features a large text input area labeled "Supplemental Information". Below this area, there are two buttons: "CREATE TASK" and "SAVE & COMPLETE TASK". The "SAVE & COMPLETE TASK" button is highlighted with a red border, indicating it is the focus of the instruction.

Important Notes:

- Links to both the **Task** and the **Audit** are available within their respective views. From within the audit, users can navigate directly to the associated task. From within the task, users can access the related audit. This allows users to easily toggle between the task and the audit for efficient navigation. Users also have the ability to **download any files** uploaded during the task creation process.

Edit Audit Task

The following comparison has been created and linked to this task: [Guardian Invoice March 2026](#) (step: Import Data)

A Touch of Pink Bakery

Carrier (Optional): Guardian

Audit Type: Invoice Reconciliation

Linked Comparison: Guardian Invoice March 2026

Name: Guardian Invoice March 2026

Task Owner: marytester (Mary Lanier)

Assignee:

Upload Files

Carrier - Payroll Combined File.xlsx

Test Files for Demos.xlsx

Test Files for Demos-mapping.xlsx

[ADD FILE](#)

Comments

Please note the below supplemental information section may be overwritten. While the comments section above will lock the comment with the timestamp once submitted.

Supplemental Information

[SAVE CHANGES & COMMENTS](#) [SAVE & COMPLETE TASK](#) [DELETE](#)

Guardian Invoice March 2026

A Touch of Pink Bakery / Comparisons / Guardian Invoice March 2026 - Import Data

[Create](#) [Import Data](#) [Select Data Points](#) [Map Data](#) [Compare](#) [Verify Discrepancies](#) [Verify Missing Data](#) [Complete](#)

Import Data

This comparison is linked to this Audit Task: [Guardian Invoice March 2026](#)

The Audit Task files may be downloaded below. Navigate to the Audit Task to view any additional information or instructions that may have been provided.

Carrier - Payroll Combined File.xlsx

Test Files for Demos.xlsx

Test Files for Demos-mapping.xlsx

Select the files to be used for comparison.

Baseline File

[Choose File](#) No file chosen

Secondary File

[Choose File](#) No file chosen

[USE BASELINE FILE](#)

[BACK](#) [SAVE](#)

- An Agency user can close the task from the audit once complete by clicking **COMPLETE AUDIT TASK**.

Guardian Invoice March 2026

A Touch of Pink Bakery / Comparisons / Guardian Invoice March 2026 - Complete

[Create](#) [Import Data](#) [Select Data Points](#) [Map Data](#) [Compare](#) [Verify Discrepancies](#) [Verify Missing Data](#) [Complete](#)

Complete

All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.

[Comparison Details](#)

Select file to export

[BACK](#) [GO TO ALL COMPARISONS](#) [COMPLETE AUDIT TASK](#)

- A completed task can be reopened if necessary.

[RE-OPEN TASK](#) [DELETE](#)

- A completed task can be deleted but ONLY by an agency user.

- **The deletion is permanent and the task cannot be restored!**

Comments

Please note the below supplemental information section may be overwritten. While the comments section above will lock the comment with the timestamp once submitted.

Supplemental Information

SAVE CHANGES & COMMENTS

SAVE & COMPLETE TASK

DELETE

Dashboards and Notifications

Streamline's Dashboards and Notifications provide users with greater visibility into their workload, tasks, and overall business activity by centralizing important information in one location. Interactive charts throughout the application provide visual summaries of key metrics, including tasks, renewals, implementations, audit activity, and other workflow items, allowing users to quickly monitor progress, identify trends, and access the related report details.

Chart Dashboards

Streamline's interactive Chart Dashboards provide greater visibility into agency and organization data by displaying key metrics in an easy-to-understand visual format. Available throughout the application, charts allow users to monitor workload, track progress, identify trends, and quickly access the detailed records behind the data. Selecting a chart section automatically filters the associated report table, where results can be further reviewed, refined, or exported.

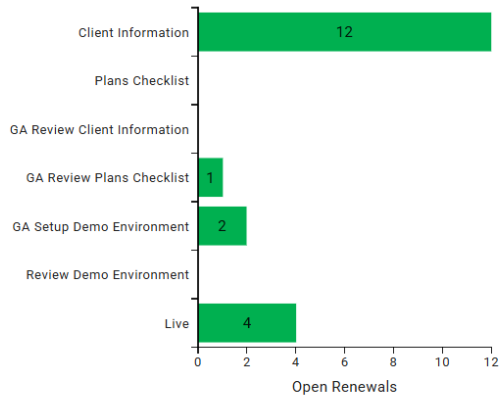
Agency and Organization dashboards provide consolidated views of tasks, renewals, implementations, audits, and other workflow activity. Users can analyze workload by task type, status, workflow step, organization, user, or date range, making it easier to prioritize work, identify bottlenecks, and make informed business decisions.

[Open Tasks Dashboard:](#)

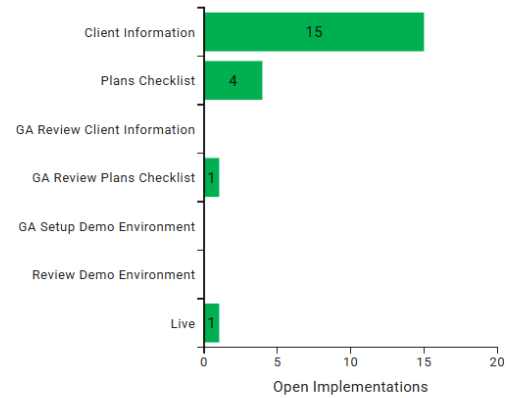
The Open Tasks dashboard provides a consolidated view of active work across the agency or organization. This dashboard displays tasks by task type and status, with Renewals and Implementations organized by their current workflow step. Agency users then can also filter dashboard results table by Organization, allowing them to focus on a specific client. All charts are interactive, allowing users to select a chart item to automatically filter and display the related records in the report table.

Open Tasks Dashboard

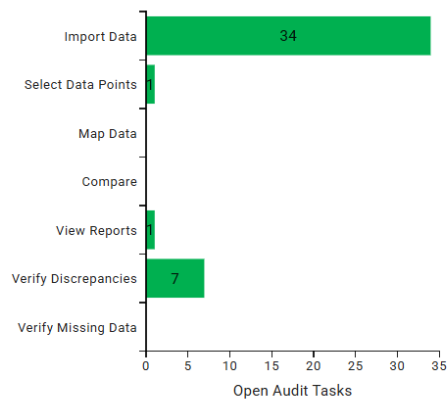
Open Renewals by Step



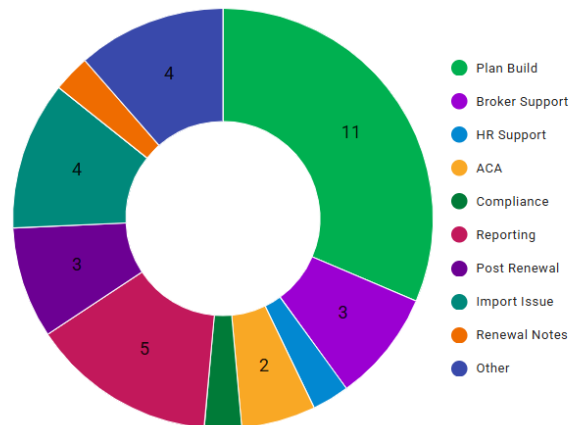
Open Implementations by Step



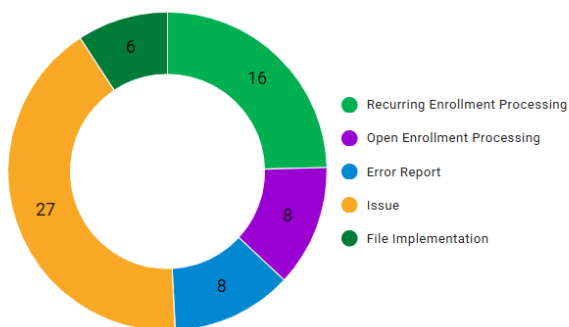
Open Audit Tasks by Comparison Step



Open Support Tasks by Type



Open Eligibility Tasks by Type



All Tasks Dashboard:

The All Tasks Dashboard includes a Report table, Tasks Created by Category chart, and Tasks Workload Dashboard to provide a complete view of task activity. The Report table displays the detailed task data, while the Tasks Created by Category chart shows the number of tasks created by month, displaying a rolling 12 months of data beginning with the current month and can be filtered by Organization. The Tasks Workload Dashboard provides an overview of all tasks, renewals, and implementations and can be filtered by Organization, User, Created Between dates, and Active status. All dashboard charts are interactive, allowing users to select a chart item to automatically filter and display the corresponding records in the Report table.

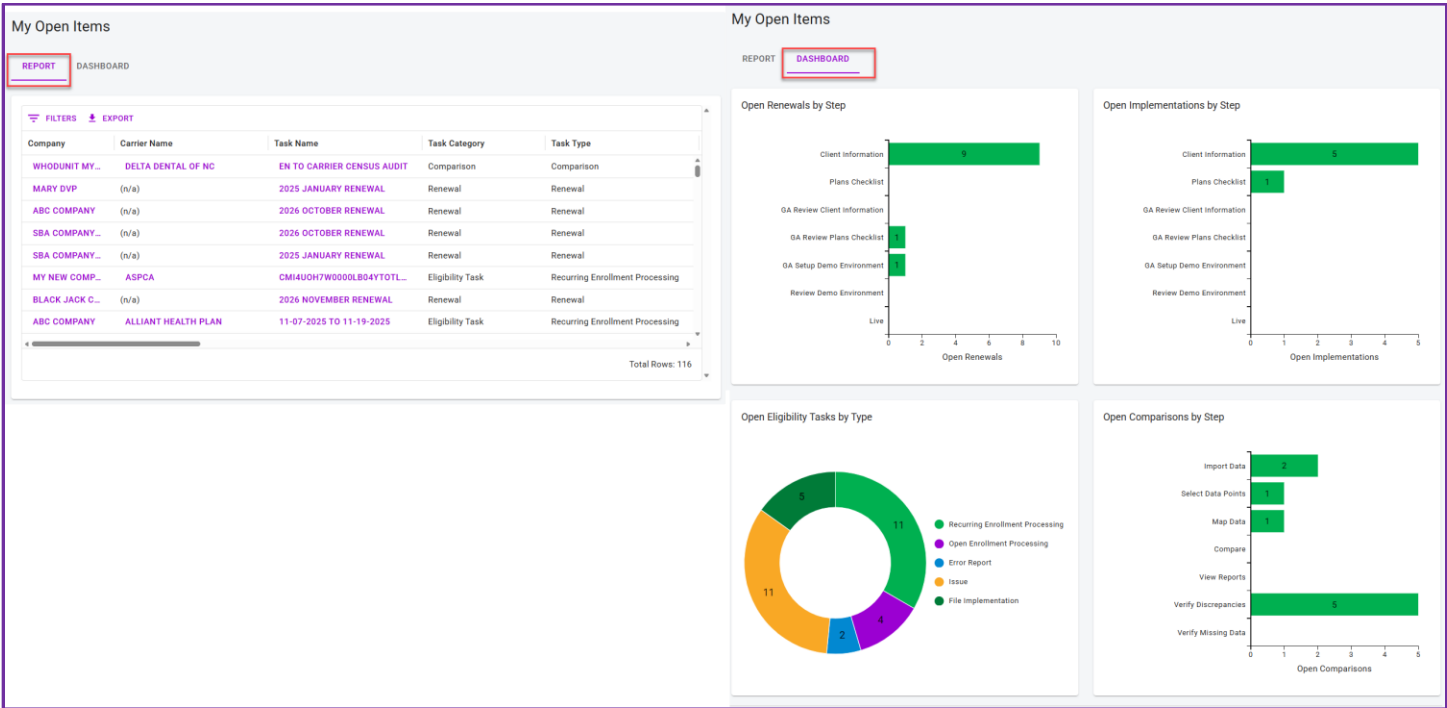


User Task Dashboards and Notifications

The User Task Dashboard and Notifications center provides users with a centralized location to manage their daily workload and review important system updates. The My Open Items section displays all **active** tasks where the user is involved, including items where they are the assignee, task creator, comparison verifier, or designated contact. Users can view their open work through a detailed report with tracking metrics or use dashboard charts to monitor tasks, renewals, and implementations by type, status, or workflow step.

The Notifications center, identified by the bell icon, maintains a history of task and wizard notifications when the user is included as an assignee or designated contact. New notifications are indicated on the bell icon and automatically marked as read once viewed. This feature ensures users can easily track important updates and maintain visibility into their assigned work, even if an email notification was missed or deleted.

My Open Items:



Notifications:

Notifications

FILTERS EXPORT

	Task Category	Name	Notification	Status	Notification Date	Read Date
●	Renewal	2027, JANUARY	You've been assigned a renewal task for T...	New	7/1/2026, 3:12:19 PM	7/8/2026, 1:...
●	Renewal	2027, JANUARY	You've been assigned a renewal task for T...	New	7/1/2026, 3:12:13 PM	7/8/2026, 1:...
	Renewal	2026, FEBRUARY	Renewal started for Bad Ideas Lab	Read	6/30/2026, 12:36:46 PM	7/1/2026, 11
	Renewal	2027, JANUARY	Renewal started for Bad Ideas Lab	Read	6/30/2026, 10:25:37 AM	6/30/2026, 1

Total Rows: 50

Carrier Invoice Conversion

The Streamline application has functionality to convert carrier invoices that are not application-friendly and require significant manual adjustments before they can be used for auditing. This conversion functionality is available to all compare users but can only be converted on the company level.

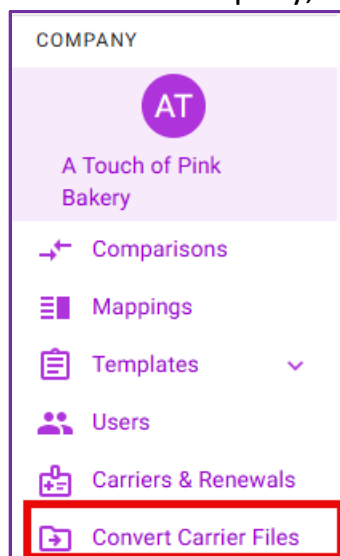
What This Functionality Does:

1. Removes adjustments and blank rows to streamline data processing.
2. Expands member names into separate columns for First Name, Last Name, and Middle Initial (MI).
3. Totals costs where benefits have separate charges on separate rows for spouse and child, such as Critical Illness and Voluntary Life.
4. Adds additional total columns for benefits that are separated in one file but combined in another. This applies to Group Life and AD&D, as well as Voluntary Life and AD&D.

The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

To convert a carrier invoice:

- Navigate to a company if organization user.
- Under the company, select Convert Carrier Files in the left-hand menu.



- Select Carrier Format dropdown and then the applicable carrier file.

Convert a File

Carrier Format ▼

Original Carrier File

Choose File No file chosen

CONVERT

- Click Choose File and select the carrier invoice

Convert a File

Carrier Format
Guardian Row Based ▼

Original Carrier File

Choose File No file chosen

CONVERT

- If multiple tabs, select the one to be converted and then rename if desired.

Convert a File

Carrier Format
Guardian Row Based

Original Carrier File

Choose File Guardian Row ...sed Invoice.xls

Select Worksheet
Download Bill

File Name
Guardian Row Based Invoice.xls

CONVERT

- Click CONVERT. A successful message will show no conversion errors.

✔ File converted and downloaded successfully! ✕

- The converted file is automatically downloaded to the user's computer and is not saved in the application.
- The file is now ready to be used in a comparison.

Reports

The Streamline application provides several downloadable reports:

Audit Reports

These reports are available for all audits once Step 5 Compare and/or Step 8 Complete have been reached.

The first set of reports are available on Step 5 Compare:

- Discrepancy Report
- Original Baseline File- discrepancies only
- Original Secondary File – discrepancies only
- Original Baseline File
- Original Secondary File

The second set of reports are available on Step 8 Complete

- All Records Including Verified
- Verified Records Only

Discrepancy Report

This is a downloadable report located on Step 5 - Compare that contains all data discrepancies and missing data identified during the compare process. The report will include a results column along with the discrepancy function column IF this functionality was selected during the mapping process.

The screenshot shows the 'Compare' step (Step 5) in the Streamline Data Management interface. The 'View Reports' section indicates that the comparison process has finished. A dropdown menu labeled 'Select file to download' is highlighted with a red box. Below this, there are two main sections: 'Comparison Details' and 'Discrepancy Counts by Data Point'. The 'Discrepancy Counts by Data Point' section is further divided into 'Discrepancy Reports' and 'Missing Counts'. The 'Discrepancy Reports' section is highlighted with a red box and a red arrow points to it. Below this, there are four options: 'Original Baseline File - discrepancies only', 'Original Secondary File - discrepancies only', 'Original Baseline File', and 'Original Secondary File'. At the bottom, a table header is visible with tabs for 'Discrepancies' and 'Missing Data'.

Original Baseline File – discrepancies only / Original Secondary File – discrepancies only

These are downloadable reports located on Step 5 – Compare. These reports display all data points within a row from either the baseline or secondary file, regardless of where the discrepancy occurs.

A dedicated discrepancy column is included that highlights the specific data point where the mismatch is found. This additional report is designed for scenarios like imports, and it ensures all relevant data points—alongside the discrepancy—are readily available for further processing.

The new Discrepancy Report can now be accessed in Step 5 Compare within the updated Download Reports dropdown. They are named: Original Baseline File – discrepancies only and Original Secondary File – discrepancies only.

Original Baseline File / Original Secondary File

This is a downloadable report located on Step 5 - Compare that contains all data from the original import files prior to mapping and is available for either the baseline or the secondary.

All Records Including Verified

This is a downloadable report located in Step 8 - Complete that contains all records from either the baseline or secondary file including the verified records (discrepancies and missing). The *All Records Including Verified* report also includes 5 additional columns added to the original files:

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type
- DMS_Ignored_Discrepancies

Select file to export

Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

	Original Name	Rename To	Format Values	Merged
=	Employee SSN			
=	First Name			

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

☐ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED
EXPORT V

BACK
GO TO ALL COMPARISONS

	D	E	F	G	H	I	J	K
1	DOB	Gender	Monthly Premium	Date of Hire	DMS_Verified_By	DMS_Auditor_Notes	DMS_Verifier_Notes	DMS_Ignored_Discrepancies
2	2/18/1989	Male	259.55	5/1/2024				
3	1/3/1975	Female	259.55	5/4/1995				
4	1/6/1980	Male		5/5/1995	[Monthly Premium]: malanier2024	[Monthly Premium]: dfasdfas		

Verified Records only

This is a downloadable report located in Step 8 - Complete that contains **only** records from either the baseline or secondary file that have been verified (discrepancies and missing). The *Verified Records only* report also includes 4 additional columns added to the original files:

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type

Select file to export

Base

Customize Export - 'Base'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

	Original Name	Rename To	Format Values	Merged
=	Employee SSN			
=	First Name			

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

☐ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED
EXPORT VERIFIED RECORDS ONLY

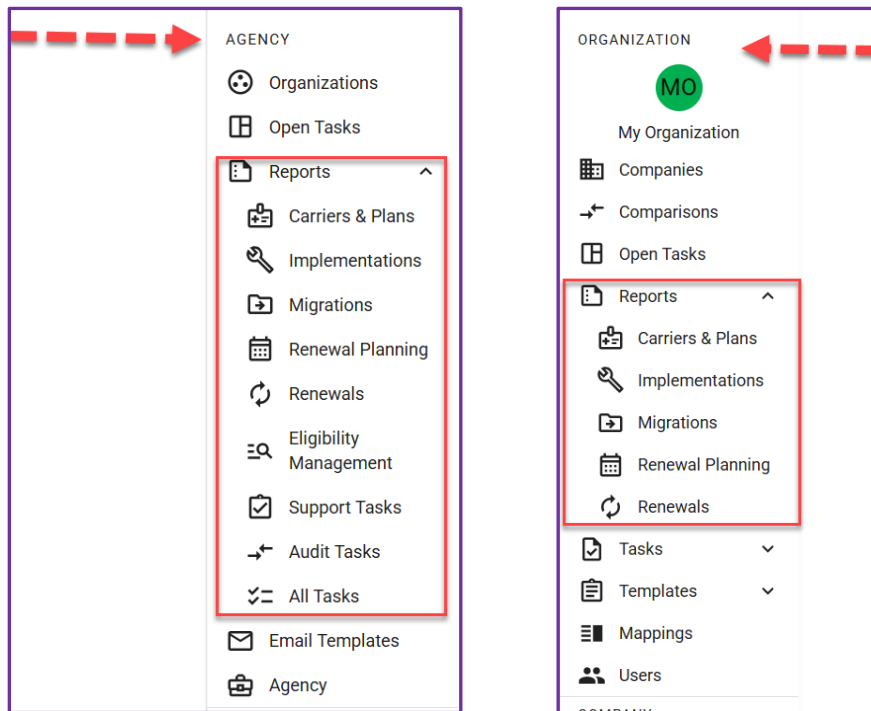
BACK
GO TO ALL COMPARISONS

	A	B	C	D	E	F	G	H	I	J
1	Employee	First Name	Last Name	DOB	Gender	Monthly P	Date of Hire	DMS Verified By	DMS Auditor Notes	DMS Verifier Notes
2	217-21-91	Katherine	Aldridge	1/6/1980	Male		5/5/1995	[Monthly Premium]: m	[Monthly Premium]: df	
3	217-21-57	Michael	Bebe	8/9/1972	Female		5/12/1995	[Monthly Premium]: m	[Monthly Premium]: as	
4	555-66-12	Julia	Benefits	#####	Female	259.55		malanier2024		
5	224-11-85	SHEILA	CARTER		Male	259.55	5/23/1995	[DOB]: malanier2024	[DOB]: asd	

Ignored Records will **not** show in the *Verified Records only* report.

Agency and Organization Reports

There are several reports that live on both the Agency and Organization level: Carriers & Plan, Implementations, Renewal Planning, Renewals, Eligibility Management, Support Tasks, Audit Tasks, and ALL tasks (Agency User only). This new section provides visibility into carriers, plans, implementations, company renewals, and tasks—all in one central location. Reports can be filtered by various columns and exported to CSV or printed, eliminating the need to navigate to each organization and company or renewal individually.



Carriers & Plans: This report provides a list of all carriers and their corresponding plans by organization and company, including key details for each carrier and plan.

Carriers & Plans



The table below shows all of the carriers and plans across your agency.

 FILTERS  EXPORT					
Organization	Company	Carrier Name	Renewal Month	Plan Name	Benefit Type
DATA MANAGE...	ABC COMPANY	ALLIANT HEALTH PLAN	October	2025-2026 PLAN 2	Vision
DATA MANAGE...	ABC COMPANY	ALLIANT HEALTH PLAN	October	2027 PLAN YEAR MEDICAL PL...	Medical
DATA MANAGE...	ABC COMPANY	ALL ONE HEALTH	December	ONE PLAN DECEMBER	HRA
DATA MANAGE...	ABC COMPANY	AMERIHEALTH ADMINISTRAT...	August	2025 DENTAL HIGH	Dental
DATA MANAGE...	ABC COMPANY	ANTHEM LIFE INSURANCE CO...	September	2025	Medical
DATA MANAGE...	ABC COMPANY	ASSURANT	January	(n/a)	(n/a)
DATA MANAGE...	ABC COMPANY	ASSURITY LIFE INSURANCE C...	June	(n/a)	(n/a)
DATA MANAGE...	ABC COMPANY	AUXIANT	February	(n/a)	(n/a)

1-8 of 222

Implementations: This table displays a summary report of all implementations in your agency. Additional details, including the status of each step, the number of days since each step was updated, and more, are visible when exporting the table.

Implementations



[IMPLEMENTATIONS REPORT](#)
[OPEN IMPLEMENTATIONS BY STEP](#)

	Organization	Company	Implementation	Kickoff Date	Last Kickoff Reminder Sent	Current Step
VIEW	MY ORGANIZA...	THE CHAOS CO...	The Chaos Committee	8/11/2026	8/11/2026	Client Information
VIEW	BROKER B: DAT...	ALPACA YOUR ...	Alpaca Your Bags 2	8/10/2026	8/10/2026	Client Information
VIEW	BROKER B: DAT...	ALPACA YOUR ...	Alpaca Your Bags	7/16/2026	7/16/2026	Completed
VIEW	MY ORGANIZA...	BOB'S DEPART...	Bob's Department of F...	8/10/2026	8/10/2026	Client Information
VIEW	BROKER B: DAT...	KATIE DEMO	Katie Demo	8/7/2026	8/7/2026	Plans Checklist
VIEW	BROKER B: DAT...	DECEMBER DE...	December Demo Com...	8/6/2026	8/6/2026	Client Information
VIEW	MY ORGANIZA...	OTTER CHAOS	Otter Chaos	7/29/2026	7/29/2026	Completed
VIEW	MY ORGANIZA...	MILDLY IMPRE...	Mildly Impressive Ente...	7/29/2026	7/29/2026	Completed

Total Rows: 28

Migrations: This table displays a summary report of all migrations in your agency. Additional details, including the origin system, the target system, kickoff date, and more, are visible when exporting the table.

Migrations

[MIGRATIONS REPORT](#)
[OPEN MIGRATIONS BY STEP](#)

	Organization	Company	Migration	Origin System	Target System	Kickoff Date	Last
VIEW	MY ORGANIZA...	MILDLY IMPRE...	Mildly Impressive Ente...	Employee Navigator	Ease	8/10/2026	8/1
VIEW	MY ORGANIZA...	THE SNEAKY S...	The Sneaky Squirrels	Ease	Employee Navigator	8/6/2026	8/6

Total Rows: 2

Renewal Planning: This table displays the month(s) in which each company is scheduled for renewal. Unlike the Renewal Report, this view only reflects when a renewal is expected to occur based on the renewal month specified for the carrier.

Renewal Planning

RENEWAL PLANNING REPORT

RENEWALS BY MONTH

		Jan	Feb	Mar	Apr	May	Jun
BROKER A: DATA - TES...	DEMO COMPANY		✓				
BROKER A: DATA - TES...	"SCRIPT"						
BROKER B: DATA MAN...	ABC COMPANY	✓					✓
BROKER B: DATA MAN...	CHRISTMAS IN JULY D...				✓	✓	✓

Total Rows: 39

Renewals: This report provides a summary of all renewals within your agency or organization, grouped by company, and includes key details for each renewal. Please note that the exported file from this table contains additional key indicators related to each renewal.

Renewals

RENEWALS REPORT

OPEN RENEWALS BY STEP

	Organization	Company	Renewal Year	Renewal Month	Kickoff Date	Last Kickoff Reminder Sent	Current
VIEW	MY ORGANIZA...	PICKLES FOR P...	2026	January	7/17/2026	7/17/2026	Clier
VIEW	BROKER B: DAT...	DESTINY DEMO	2025	December	9/10/2025	9/10/2025	Clos
VIEW	BROKER B: DAT...	HEATHER DEMO	2026	November	7/16/2026	7/16/2026	Clier
VIEW	BROKER B: DAT...	UNICORN LOGI...	2026	January	7/7/2026	7/7/2026	Clier
VIEW	BROKER B: DAT...	A TOUCH OF PI...	2026	January	10/28/2025	10/28/2025	Com

Total Rows: 61

Eligibility Management: This table provides a view of all Eligibility Management tasks created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing.

Eligibility Management					
ELIGIBILITY TASKS REPORT OPEN ELIGIBILITY TASKS BY TYPE					
Eligibility Management Tasks					
FILTERS EXPORT					
Organization	Company	Carrier Name	Task Name	Changes Date Range	Task Type
MY ORGANIZA...	MILDLY IMPRE...	AETNA	AETNA 2026 FILE RENEWAL 8...	(n/a)	File I
MY ORGANIZA...	PICKLES FOR P...	GUARDIAN	GUARDIAN WEEKLY ENROLLM...	7/13/2026 - 7/17/2026	Recu
MY ORGANIZA...	THE SNEAKY S...	90 DEGREE BENEFITS	90 DEGREE 834 IMPLEMENTA...	(n/a)	File I
BROKER B: DAT...	SMITH AND JO...	AETNA	AETNA FTP CREDENTIALS UP...	(n/a)	Issu
Total Rows: 38					

Support Tasks: This table provides a view of all Support tasks created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing.

Support Tasks					
SUPPORT TASKS REPORT OPEN SUPPORT TASKS BY TYPE					
Support Tasks					
FILTERS EXPORT					
Organization	Company	Carrier Name	Plan Name	Task Name	Task Type
MY ORGANIZA...	BOB'S DEPART...	(n/a)	(n/a)	ACA FILING SUPPORT REQUEST	ACA
BROKER B: DAT...	CARLA DEMO	EYEMED	Basic Vision	RATE CHANGE	Plan Build
MY ORGANIZA...	THE ACCIDENT...	ADP	(n/a)	ADP ISSUE WITH SSNS	Other
MY ORGANIZA...	THE ACCIDENT...	(n/a)	(n/a)	ACA SETUP ASSISTANCE REQ...	ACA
Total Rows: 25					

Audit Tasks: This table provides a view of all Audits tasks created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing.

Audit Tasks					
AUDIT TASKS REPORT OPEN AUDIT TASKS BY COMPARISON STEP					
Audit Tasks					
FILTERS EXPORT					
Organization	Company	Carrier Name	Task Name	Comparison	Compe
MY ORGANIZA...	THE SNEAKY S...	(n/a)	GUARDIAN JULY 2026 INVOIC...	GUARDIAN JULY 2026 INVOIC...	Impe
MY ORGANIZA...	PICKLES FOR P...	GUARDIAN	GUARDIAN JULY 2026 INVOIC...	GUARDIAN JULY 2026 INVOIC...	Impe
MY ORGANIZA...	OTTER CHAOS	GUARDIAN	GUARDIAN JULY 2026 INVOIC...	GUARDIAN JULY 2026 INVOIC...	Impe
MY ORGANIZA...	THE ACCIDENT...	(n/a)	GENERAL AUDIT	GENERAL AUDIT	Verif
BROKER B: DAT...	FLY EAGLES FL...	AETNA	AETNA POST ENROLLMENT A...	AETNA POST ENROLLMENT A...	Verif
					Total Rows: 17

ALL Tasks: This table provides a view of all tasks including renewals and implementations created for the organizations and companies available to the user. The report can be easily exported for additional review or sharing. This table is only available to AGENCY USERS.

All Tasks					
TASKS REPORT TASKS CREATED BY CATEGORY TASKS WORKLOAD DASHBOARD					
FILTERS EXPORT					
Organization	Company	Carrier Name	Task Name	Task Category	Task Type
MY ORGANIZA...	THE CHAOS CO...	(n/a)	THE CHAOS COMMITTEE	Implementation	Implementa
MY ORGANIZA...	THE SNEAKY S...	(n/a)	GUARDIAN JULY 2026 INVOIC...	Audit Task	Audit Task
BROKER B: DAT...	ALPACA YOUR ...	(n/a)	ALPACA YOUR BAGS 2	Implementation	Implementa
MY ORGANIZA...	MILDLY IMPRE...	(n/a)	MILDLY IMPRESSIVE ENTERP...	Migration	
BROKER B: DAT...	KATIE DEMO	(n/a)	KATIE DEMO	Implementation	Implementa
					Total Rows: 171

Key Words

The application has key words that it utilizes to determine a match between columns. These key words are:

SSN:

- ssn
- social security number
- socialsecuritynumber
- ss#
- social security #
- ee id
- social security no
- memberid

First Name:

- first name
- firstname
- first_name
- fname

Last Name:

- last name
- lastname

Address:

- Address
- Address 1
- Address 2
- Address
- ADDRESS LINE 1
- ADDRESS LINE 2
- Street Address

Date of Hire:

- doh
- date of hire
- hire date

Date of Birth:

- dob
- date of birth
- birth date

Termination Date

- dot
- term date
- termination date

Zip

- Zip
- Zip code

Knowledge Base



The Streamline application provides a knowledge base for frequently asked questions.

[Streamline Knowledge Base | Streamline by DMS](#)

Benefit Systems



The Streamline application provides instructional videos for various carrier files for enrollments and invoices.

[Streamline Data Frequently Used Systems | Streamline by DMS](#)

Release Notes



The Streamline application release notes are available through our website for reference.

[Release Notes Log | Streamline by DMS](#)

Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
Draft 1	06/01/2021	New document	Mary Lanier
1.0	06/01/2021	Approved document	Mary Lanier
2.0	03/21/2023	Updated instructions for Template Enhancements	Mary Lanier
2.1	07/24/2023	Updated instructions for Additional User Types, Inactivate Users. Added "memberid" to SSN keyword, Added Sample registration email	Mary Lanier
2.2	11/29/2023	Updated email address from datatool@brokerbuildersolutions.com to support@dms-datavalidate.com	Mary Lanier
2.3	03/26/2024	Updated logo and added additional instructions for moving templates to the organization level. Updated website references for new website.	Mary Lanier
2.4	05/24/2024	Updated verbiage to include masked social security number and how to assign a verifier. Also included notification emails to verifier and to auditor	Mary Lanier
2.5	07/09/2024	Updated to include carrier tracking enhancement	Mary Lanier
2.6	10/15/2024	Added verbiage to include discrepancy type dropdown, additional field to the carrier tracking information, and termination company date	Mary Lanier
2.7	12/05/2024	Updated with new enhancements including additional discrepancy reports and customized emails	Mary Lanier
2.8	02/18/2025	Updated to include the Carrier Invoice Conversion functionality	Mary Lanier
2.9	05/20/2025	Updated to include Plan Information and additional fields	Mary Lanier
3.0	06/12/2025	Updated import functionality for carrier, carrier plans, and company	Mary Lanier
4.0	10/23/2025	Updated images	Mary Lanier
5.0	12/05/2025	Updated Eligibility Management Tracking	Mary Lanier

6.0	01/05/2026	Rebrand, Mapping, Rounding Variance, Additional task type to EMT	Mary Lanier
7.0	03/30/2026	Audit and Support tasks – Release Notes 03-24-2026 and 02/18/2026	Mary Lanier
8.0	06/17/2026	Release notes for 05/22/2026	Mary Lanier
9.0	07/08/2026	Release notes for 07/10/2026	Mary Lanier
10.0	08/10/2026	Release notes for 08/10/2026	Mary Lanier