

Company User Guide



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DATA MANAGEMENT SOLUTIONS

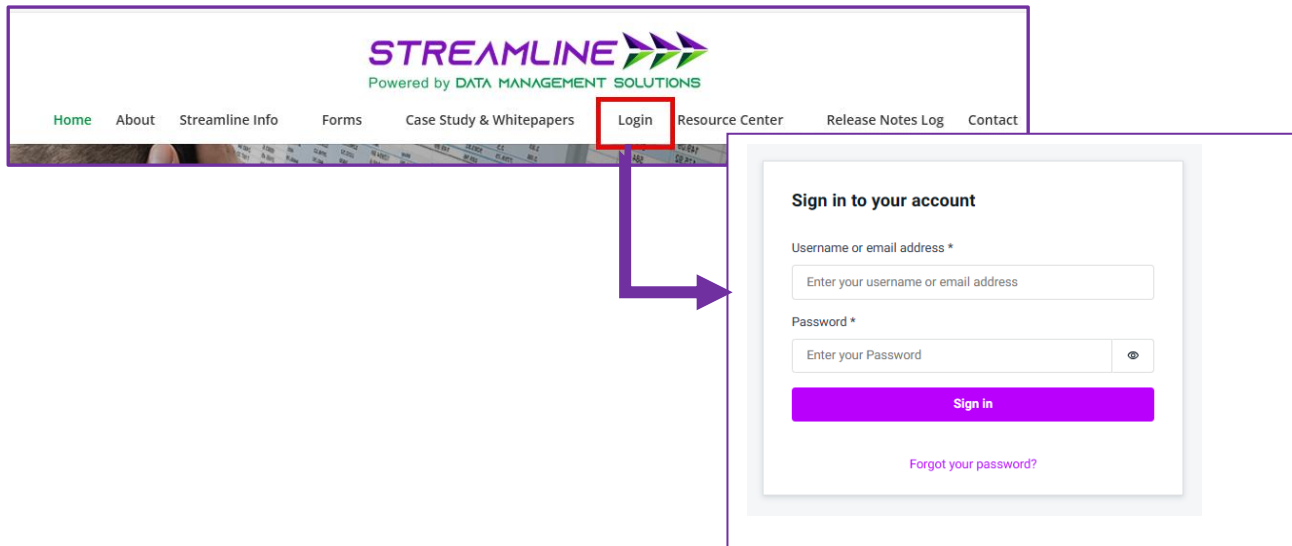
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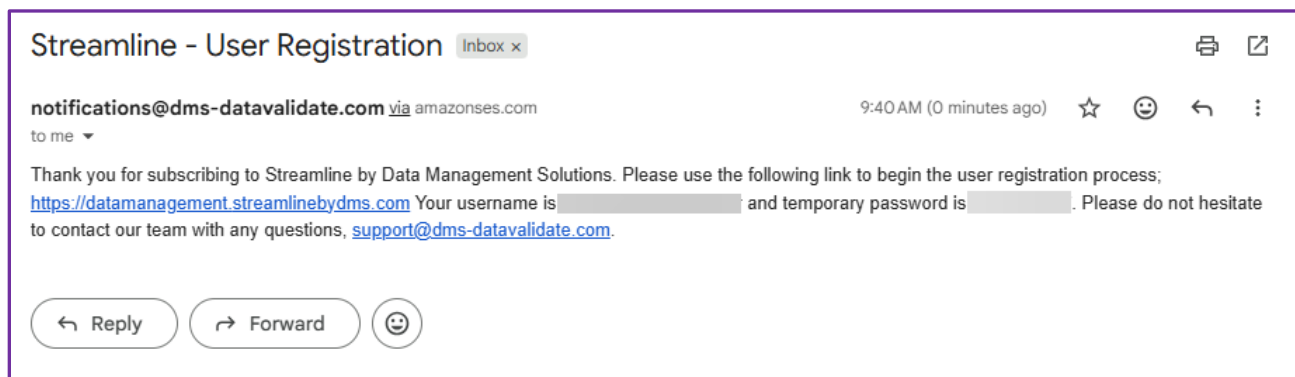
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Login

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**

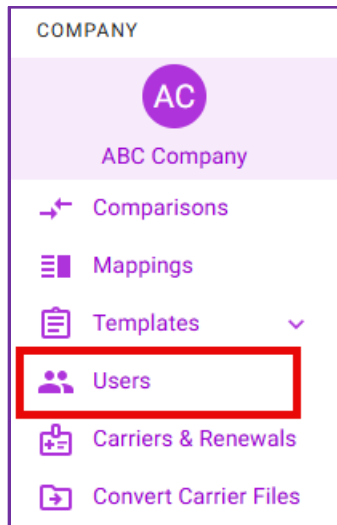
Allows verification of discrepancies and missing data for existing compares within a single company. This role does not include compare and merge functionality.

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

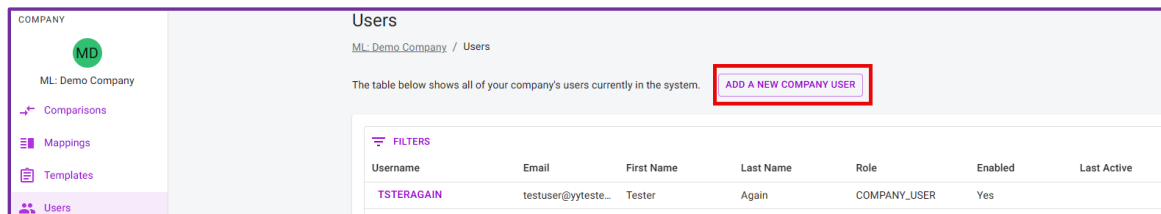
Only Company level users are discussed in this set of instructions. Please reference the Agency or Organization Level User process document for information pertaining to that level.

Adding a Company Level Verifier user

Select Users in the left menu bar.



Select ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user. Company admin users are restricted to creating company level verifiers only. The verifier access is limited to verifying discrepancies and missing data for existing compares only. No compare and merge functionality exists for this level.

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level

Company Verifier Access Only ▾

Role

☒ COMPANY_USER

SAVE

Once all applicable information has been entered click Save.

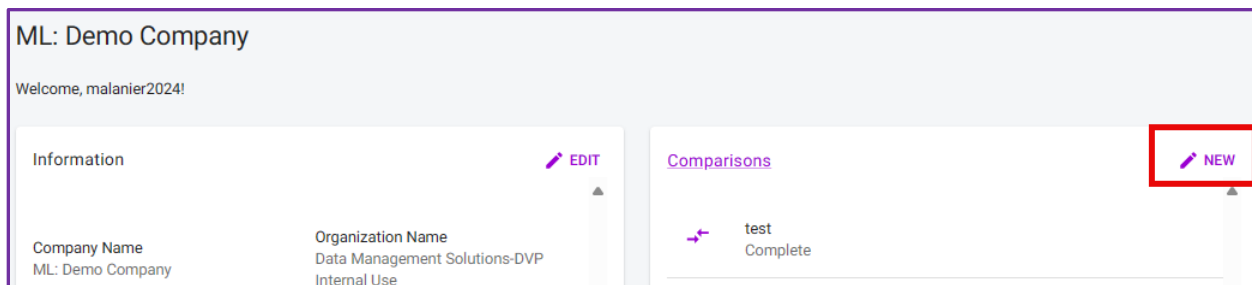
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Create the Compare Only

Please note audit creation is restricted to Company Admin users which are only available under the Platinum Elite Plan. 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.

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

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

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.

Import Data

Select the files to be used for comparison.

Test Files for ...03.07.2024.xlsx

.xlsx

Test Files for ...03.07.2024.xlsx

.xlsx

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

AI

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 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 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
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

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
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 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 **Medical Plan** data point. As a result, the **Discrepancy Type** and the **Verifier Note**, "*Verifier Note added here,*" will be applied to every **Medical Plan** data point in the comparison.

The screenshot shows a comparison interface with two columns of data. The first column contains 'John' and 'Brin, jr'. The second column contains '17 / Medical Plan' and '17 / Medical Plan'. To the right of the data is a control panel with radio buttons for 'Plan 1' (selected), '2025 HDHP Plan', 'Overwrite', and 'Ignore'. To the right of the control panel are three text input fields: 'Discrepancy Type', 'Auditor notes', and 'Verifier notes'. The 'Verifier notes' field contains the text 'Verifier Note added here'. At the bottom right of the interface is a button labeled '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.](#)

The screenshot shows a 'Verify Missing' interface. At the top, there is a 'Rows per page' dropdown set to '5' and a '1-2 of 2' indicator. Below this is a 'Verifier Memo' dropdown menu. To the left of the dropdown are three buttons: 'BACK', 'NEXT', and 'OVERRIDE AS COMPLETE'. To the right of the dropdown is a large text input field labeled 'Verifier Memo'. Below the input field is a small note: '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

☐ Include
☐ Exclude

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.

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:

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

Please note audit creation is restricted to Company Admin users which are only available under the Platinum Elite Plan. 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.

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 you use 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 AI

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

×

Employee SSN

Employee SSN

☒ Unique Identifier

×

First Name

First Name

☐ Unique Identifier

×

Middle Name

Middle Name

☐ Unique Identifier

×

Last Name

Last Name

☐ Unique Identifier

×

Employment Status

Employment Status

☐ Unique Identifier

×

Monthly Premium

Monthly Premium

☐ Unique Identifier

×

[+ 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**.

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.



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
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
 MM/dd/yyyy

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

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.



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 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 Medical Plan data point. As a result, the Discrepancy Type and the Verifier Note, "Verifier Note added here," will be applied to every Medical Plan data point in the comparison.

John	Brin, jr	17 / Medical Plan	17 / Medical Plan	☒ Plan 1 ☐ 2025 HDHP Plan ☐ Overwrite ☐ Ignore	--	Discrepancy Type Auditor notes Verifier notes Verifier Note added here 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

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.

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

Company Verifier Process

Select company

Select the comparison to verify the audit.

ML: Demo Company

Welcome, companyverifier-dms!

Information

[EDIT](#)

Company Name ML: Demo Company	Organization Name Data Management Solutions-DVP Internal Use
Comparisons Count 7	Users Count 2
Active Yes	

Comparisons

[NEW](#)

→

Demo Audit 04.04.2024
Verify Discrepancies

→

Compare and Merge
Complete

→

Mappings on org level
Compare

→

Demo Audit
Complete

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. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to POST YOUR NOTES 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	'Secondary' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Post Your Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	☐ 654.98 ☐ 259.55 ☐ Overwrite ☐ Ignore	-		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	'Secondary' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Post Your Notes
					☐ Julia ☐ JuliaAnne ☐ Overwrite ☒ Ignore	-	Auditor notes Verifier notes

Benefits	13 / First Name	13 / First Name	Ignore
----------	-----------------	-----------------	--------

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.

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 POST YOUR NOTES 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 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	'Secondary' row	Duplicate unique identifier row	Verified Inclusion	Last Verified By	Post Your Notes
Tricia	Yang		0260_21722 0260	203			☐ Include ☐ Exclude		Auditor notes Please add to the export Verifier notes

1/1 records have changes and need to be updated

SAVE

BACK

NEXT

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

VERRIDE 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.

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the Platform, 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 --

From Ben Admin System

One row per member

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 Platforms 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.

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.

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:

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, click GO TO ALL COMPARISONS.

Questions: Contact Support@dms-datavalidate.com

Email Customization

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

Viewable only by Company Users

Customization is available for the following:

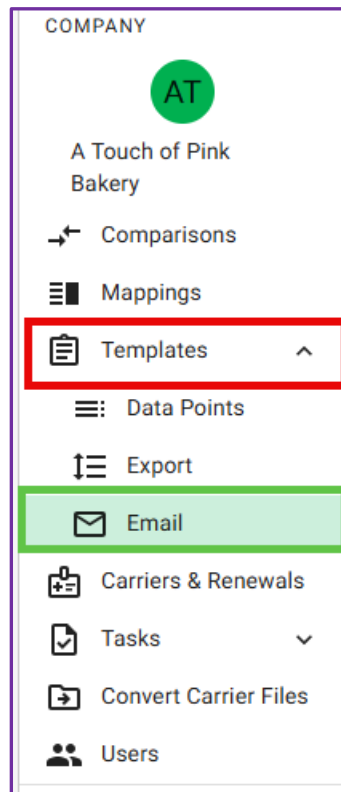
- Audit Task Assignment
- Comparison to Auditor
- Comparison to Verifier
- Eligibility Management Task Assignment
- Eligibility Management Task Assignment – Error Report
- Renewal Task Assignment
- Renewal Task Broker Managed
- Renewal Task Complete
- Renewal Task Kickoff
- Renewal Task Kickoff Follow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

Key Features:

1. Customizable Templates:
 - Email templates can be found in the template library at both the 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 missing counts in your emails for more personalized and informative communication.
3. Priority Rules:
 - Company-Level Priority: If email templates are customized at both the organization and company levels, the company-level template will take precedence.
 - Fallback to Organization-Level: If no company customization is present, the application will use the organization-level customization.
 - Default System Emails: If no customization is made at either level, the application will default to the system-generated email.

How to Customize an Email

1. To customize an email, navigate to the **Template Library** at the **Company** level, then select **EMAIL**.
 - At the **Company** levels, a dropdown will be available for selection.



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

Email Templates

[A Touch of Pink Bakery](#) / Email Templates

Browse the Email Templates available and customize them if desired.

Company Email Templates

Email Templates

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

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

Company 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}}

Company 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

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:

My Open Items

REPORT

DASHBOARD

FILTERS

EXPORT

Company	Carrier Name	Task Name	Task Category	Task Type
WHODUNIT MY...	DELTA DENTAL OF NC	EN TO CARRIER CENSUS AUDIT	Comparison	Comparison
MARY DVP	(n/a)	2025 JANUARY RENEWAL	Renewal	Renewal
ABC COMPANY	(n/a)	2026 OCTOBER RENEWAL	Renewal	Renewal
SBA COMPANY...	(n/a)	2026 OCTOBER RENEWAL	Renewal	Renewal
SBA COMPANY...	(n/a)	2025 JANUARY RENEWAL	Renewal	Renewal
MY NEW COMP...	ASPCA	CMI4UOH7W000LB04YTOTL...	Eligibility Task	Recurring Enrollment Processing
BLACK JACK C...	(n/a)	2026 NOVEMBER RENEWAL	Renewal	Renewal
ABC COMPANY	ALLIANT HEALTH PLAN	11-07-2025 TO 11-19-2025	Eligibility Task	Recurring Enrollment Processing

Total Rows: 116

My Open Items

REPORT

DASHBOARD

Open Renewals by Step

Step	Count
Client Information	9
Plans Checklist	1
GA Review Client Information	1
GA Review Plans Checklist	1
GA Setup Demo Environment	1
Review Demo Environment	1
Live	0

Open Implementations by Step

Step	Count
Client Information	5
Plans Checklist	1
GA Review Client Information	0
GA Review Plans Checklist	0
GA Setup Demo Environment	0
Review Demo Environment	0
Live	0

Open Eligibility Tasks by Type

Type	Count
Recurring Enrollment Processing	11
Open Enrollment Processing	4
Error Report	2
Issue	11
File Implementation	9

Open Comparisons by Step

Step	Count
Import Data	2
Select Data Points	1
Map Data	1
Compare	0
View Reports	0
Verify Discrepancies	5
Verify Missing Data	0

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, 1:4
●	Renewal	2027, JANUARY	You've been assigned a renewal task for T...	New	7/1/2026, 3:12:13 PM	7/8/2026, 1:4
	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 Data Validation Platform has functionality to convert carrier invoices that are not platform-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.

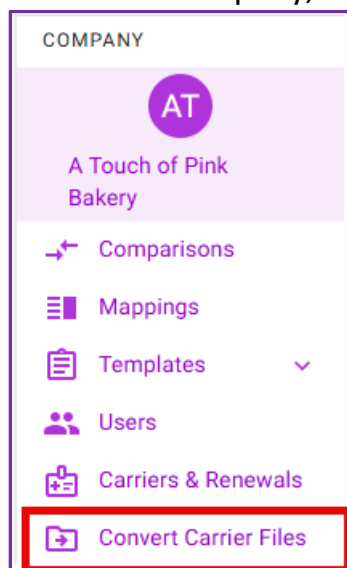
What This Functionality Does:

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:

1. Navigate to a company if organization user.
2. Under the company, select Convert Carrier Files in the left-hand menu.



3. Select Carrier Format dropdown and then the applicable carrier file.

Convert a File

Carrier Format

Original Carrier File

Choose File

No file chosen

CONVERT

4. 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

5. 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

6. Click CONVERT. A successful message will show no conversion errors.

✔ File converted and downloaded successfully! ✕

7. The converted file is automatically downloaded to the user's computer and is not saved in the Platform.
8. The file is now ready to be used in a comparison.

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:

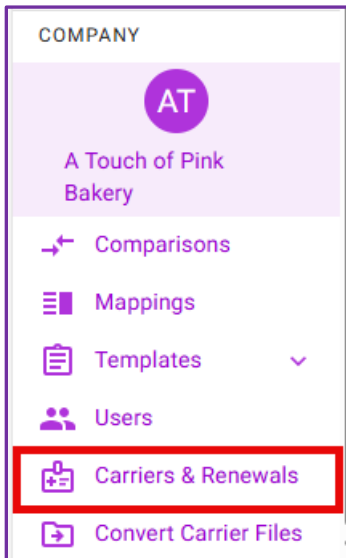
- Company Name (**Required** and must match company name in application)
- Carrier Name (**Required** and must match carrier name found in Import Template)
- Group Number (**Required**)
- Renewal Month (**Required**)
- Renewal Kickoff Days in Advance (Can choose between 30 to 90 days)
- Carrier Invoice 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.

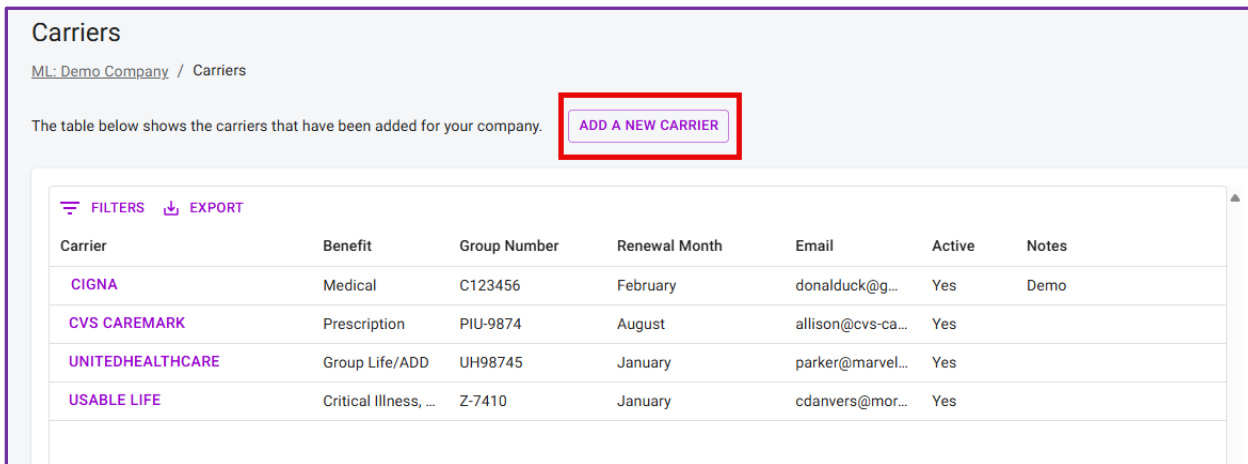
Carrier information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Manually Add Carrier

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



Click ADD A NEW CARRIER



Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable.

- Carrier Name: The available carriers are provided. 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)
- Renewal Month: Please select the company's annual benefit renewal month.

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

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

Notes

SAVE

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.

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 and are restricted to the specific company. To access the library, click on TEMPLATES under the company left side menu and then select the type of template.

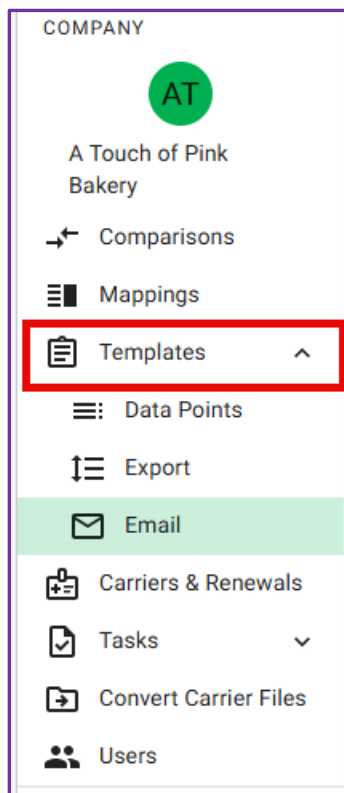
PLEASE NOTE: Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

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 on the company level. **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 Points Templates

Data Management Solutions-DVP Internal Use / Data Points Templates / Demo Import Template

Browse the Data Points Templates available to all companies during comparisons.

Shared Data Point Templates

Data Points Template

Demo Import Template



Shared with Organization from Company: [ML: Demo Company](#)

Last updated on 3/26/2024 by: malanier2024

Baseline File

Employee SSN
Social Security Number
First Name
Middle Name
Last Name
DOB
Employment Status

Secondary File

Employee SSN
Social Security Number
First Name
Middle Name
Last Name
DOB
Employment Status

☒ Unique Identifier

☒ Unique Identifier

☐ Unique Identifier

☐ Unique Identifier

☐ Unique Identifier

☐ Unique Identifier

☐ Unique Identifier

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:

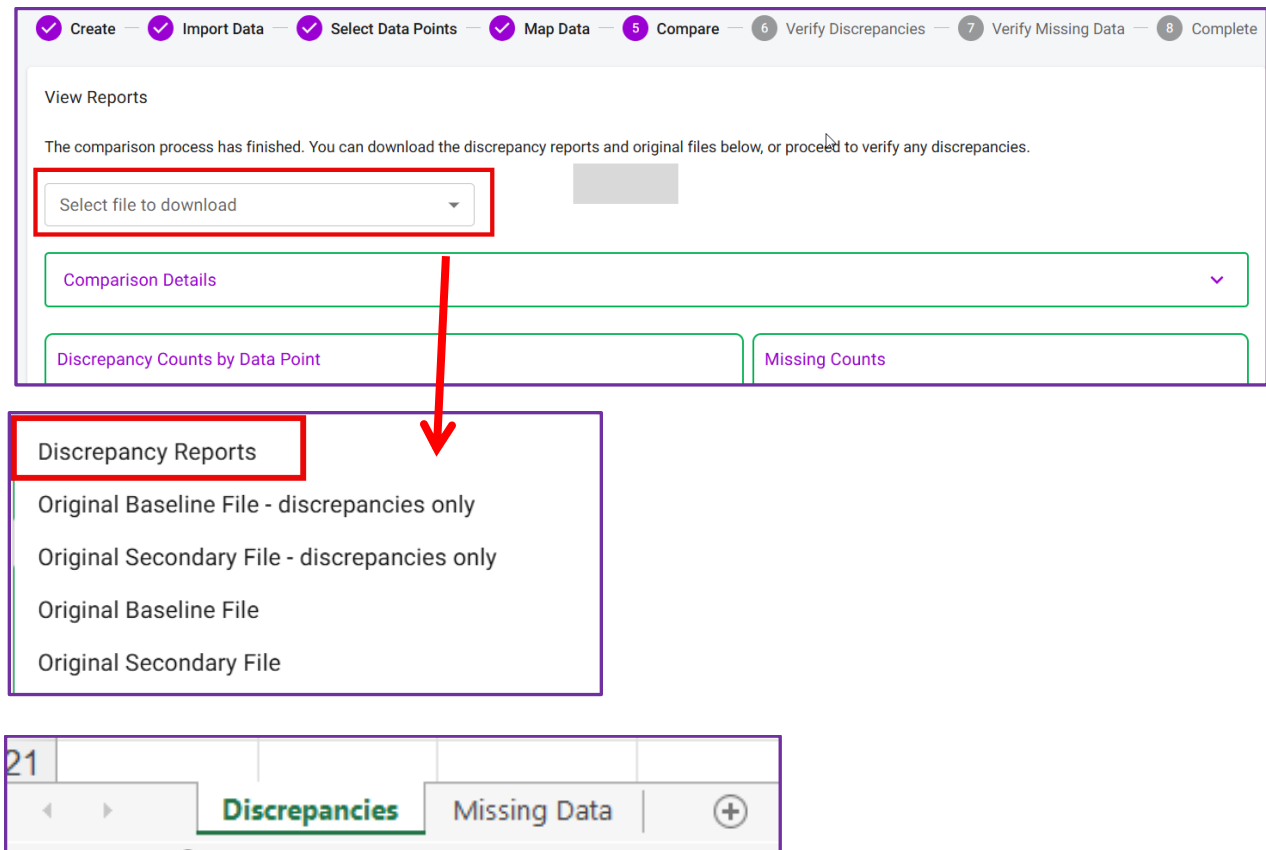
- Discrepancy Report
- Original Baseline File- discrepancies only
- Original Secondary File – discrepancies only
- Original Baseline File
- Original Secondary File

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.



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	5/4/1999				
4	1/6/1980	Male		5/5/1999	[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

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SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED
EXPORT VERIFIED RECORDS ONLY

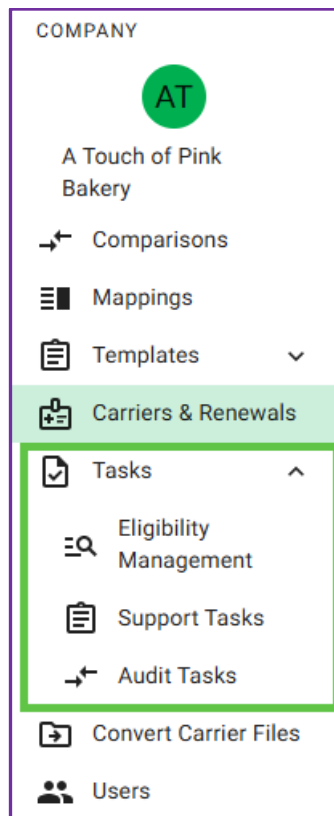
BACK
GO TO ALL COMPARISONS

	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		5/5/1999	[Monthly Premium]: m	[Monthly Premium]: df	
3	217-21-57	Michael	Bebe	8/9/1972	Female		5/12/1999	[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	5/23/1999	[DOB]: malanier2024	[DOB]: asd	

Ignored Records will **not** show in the *Verified Records only* report.

Company Reports

There are several reports that live on the Company level: Eligibility Management, Support Tasks, and Audit Tasks. This new section provides visibility into tasks—all in one central location. Reports can be filtered by various columns and exported to CSV or printed.



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.

Carrier Name	Task Name	Changes Date Range	Task Type	Processing/Err
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 L
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 L
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

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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.

Carrier Name	Plan Name	Task Name	Task Type	Assignee
(n/a)	(n/a)	NEW TASK ADDED	Plan Build	ima_agency_user
BLUE CROSS BLUE SHIELD	(n/a)	INCORRECT MAPPING FOR FU...	Plan Build	
BLUE CROSS BLUE SHIELD	Blue Options Plan 1	INCORRECT MAPPING FOR FU...	Plan Build	gaagent
(n/a)	(n/a)	SUPPORT TASK -REPORETING	Reporting	dmsagency
(n/a)	(n/a)	PLAN BUILD SUPPORT TASK	Plan Build	dmsagency
(n/a)	(n/a)	JFALKJDFL;KAJSDFKL;AJSD;K...	Broker Support	ima_agency_user
(n/a)	(n/a)	CREATE A NEW REPORT FOR ...	Reporting	gaagent
SOLSTICE	(n/a)	CREATING SUPPORT TASK AS ...	Other	

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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

NEW

FILTERS EXPORT

Carrier Name	Task Name	Comparison	Comparison Step	Assignee
(n/a)	2025-2026 MEDICAL - GOLD	2025-2026 MEDICAL - GOLD	Import Data	gaagent
BLUE CROSS BLUE SHIELD	BCBS TO EN INVOICE JULY 20...	BCBS TO EN INVOICE JULY 20...	Import Data	dmsagency
GUARDIAN	GUARDIAN INVOICE MARCH 2...	GUARDIAN INVOICE MARCH 2...	Select Data Points	
BLUE CROSS BLUE SHIELD	AUDIT TASK	AUDIT TASK	Complete	dmsagency
BLUE CROSS BLUE SHIELD	BCBS POST OE ENROLLMENT ...	BCBS POST OE ENROLLMENT ...	Complete	
GUARDIAN	GUARDIAN: DENTAL POST OE ...	GUARDIAN: DENTAL POST OE ...	Import Data	gaagent
BLUE CROSS BLUE SHIELD	BCBS 2026 Q2 CK AUDITS	BCBS 2026 Q2 CK AUDITS	Import Data	gaagent
BLUE CROSS BLUE SHIELD	BCBS 2026 Q1 CK AUDIT	BCBS 2026 Q1 CK AUDIT	Verify Discrepancies	gaagent

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Key Words

The Platform 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 Data Validation Platform provides a knowledge base for frequently asked questions.

[DV Platform Knowledge Base - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)

Benefit Systems



The Data Validation Platform provides instructional videos for various carrier files for enrollments and invoices.

[DV Platform Benefit Systems - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)

Release Notes



The Data Validation Platform release notes are available through our website for reference.

[Release Notes Log - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)

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	06/23/2023	Updated instructions	Mary Lanier
3.0	04/04/2024	Updated instructions to include new color scheme, website, and enhancements.	Mary Lanier
4.0	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
5.0	07/09/2024	Updated to include carrier tracking enhancement	Mary Lanier
6.0	10/15/2024	Added verbiage to include discrepancy type dropdown and additional field to the carrier tracking information	Mary Lanier
7.0	12/05/2024	Updated with new enhancements including additional discrepancy reports and customized emails	Mary Lanier
8.0	02/19/2025	Updated with new enhancement for Carrier Invoice Conversion	Mary Lanier
9.0	05/20/2025	Updated with new carrier plan feature and additional user fields	Mary Lanier
10.0	06/12/2025	Updated carrier and plan fields	Mary Lanier
11.0	10/23/2025	Updated images	Mary Lanier
12.0	03/30/2026	Audit and Support tasks – Release Notes 03-24-2026 and 02/18/2026	Mary Lanier