

Release Update – August 2026

Streamline (Data Management Solutions) is pleased to announce this week's enhancements and fixes to our application. Each enhancement and fix has been grouped by Solution Area (Data and/or Ben Ops) for easier identification and review.

New + Improved

Ben Ops Solution Area

Migration Wizard

A new **Client Migration Wizard** has been added to the **Ben Ops** solution area to streamline the process of moving an existing Streamline company from one benefits administration system to another.

The Migration Wizard enables the General Agency (GA) to track key milestones throughout the migration process, including:

- Receipt of login credentials
- Completion of the group structure setup in the new benefits administration system
- Extraction and import of demographic and enrollment data

The wizard also supports file uploads, allowing all migration-related documentation to be stored in a central location for improved visibility and collaboration.

The Migration Wizard provides a centralized, standardized process for managing client migrations, improving visibility into project status, ensuring key implementation steps are not overlooked, and creating a complete record of migration activities and supporting documentation. This helps teams collaborate more effectively and keeps migrations organized from start to finish.

File Renewal Task

A new **File Renewal** task has been added to **Eligibility Management** to help agencies manage and track carrier file renewals for existing companies during each renewal cycle.

The File Renewal task is available for existing carrier connections and provides a centralized workflow for tracking key milestones throughout the renewal process, including:

- Enrollment start and end dates
- Initial carrier outreach
- Receipt of required renewal information, such as updated file structures and mapping changes
- Expected carrier file request date
- Date the renewal file was sent

The File Renewal task provides a consistent process for managing annual carrier file renewals, improves visibility into renewal progress, and helps ensure critical milestones and deliverables are completed on time. By centralizing dates, documentation, and renewal activities in a single task, agencies can better coordinate with carriers, reduce the risk of missed steps, and maintain an accurate history of each year's renewal process.

New Carriers and Benefit Type

As part of our ongoing enhancements, Streamline now includes additional carrier options and support for a new benefit type: **Medical Bridge**.

These additions expand the available carrier and benefit selections throughout the application, providing greater flexibility when configuring companies, plans, and enrollment workflows.

Adding new carriers and the Medical Bridge benefit type allows agencies to support a broader range of client offerings, reduces the need for workarounds, and ensures Streamline continues to align with evolving carrier and benefits administration needs.

Updated Support Task Types

Two new **Support Task Types** have been added to Streamline:

- **Client Termination**
- **Plan Build Change**

These new task types provide dedicated workflows for managing client terminations and requests for plan build modifications, making it easier to categorize and track these support activities.

Adding these task types improves task organization, enhances reporting, and ensures support requests are routed and tracked more accurately. This helps teams manage work more efficiently while providing greater visibility into the types of support being performed.

Enhanced Census Language for Client Implementation

The **Client Implementation** workflow has been updated to provide clearer guidance on uploading **Census Files** during the **Plans Checklist** step.

Additional language has been added to the following areas:

- **Steps to Complete Plans Checklist**
- **Plans Documents**
- **Individual Plan Eligibility & Census Documents** upload section

These updates clearly identify where Census Files should be uploaded, providing more explicit instructions than were previously available.

The enhanced language reduces confusion during the implementation process by clearly directing users to the appropriate upload locations for Census Files. This helps ensure required documentation is submitted correctly, streamlines the implementation workflow, and minimizes delays caused by missing or misplaced files.

Commission Disclosure Fields

Streamline now includes additional Commission Disclosure Notice fields on both the Carrier and Plan detail pages.

When commission information is entered at the carrier level, it automatically defaults to all plans associated with that carrier. If a specific plan has different commission details, the default values can be overridden at the plan level.

The new Commission Disclosure fields are also supported during Carrier and Carrier Plan imports and are available in the Carriers & Plans report export.

The new fields include:

- **Commission Type:** Percentage (%), Per Employee Per Month (PEPM), or Grading Scale
- **Commission Value:** A corresponding field that is populated based on the selected commission type

These enhancements improve the visibility of commission information across carriers and plans, providing a centralized location to view and manage commission disclosures. By supporting carrier-level defaults, plan-level overrides, imports, exports, and reporting, Streamline reduces duplicate data entry while making commission details easier to maintain, review, and share.

Ben Ops and Data Solution Areas

Ability to Assign Agency as the Assignee

Streamline now allows you to assign an **Agency** as the assignee when multiple agencies are connected to a company. Previously, assignments in supported fields were limited to users within the connected agency. With this enhancement, you can assign either a specific user **or** an agency, providing greater flexibility in task routing.

When an Agency is selected as the assignee, notifications are sent to that agency's default support email address. Only one assignment type can be selected at a time—either an individual user or an Agency. Selecting one automatically excludes the other.

This enhancement supports organizations that work with multiple agencies responsible for different services or lines of business. By allowing tasks to be assigned directly to an Agency, work can be routed to the appropriate team without requiring a specific individual, improving flexibility, collaboration, and continuity when responsibilities are shared across agencies.



Reminder: Carrier, Carrier Plans, and ALL associated modules Availability

Please note that Carriers, Carrier Plans, as well as Implementations, Migrations, Renewals and most Task Tracking Modules are only available to subscribers on Streamline BenOps.

If you're interested in upgrading your current subscription, please contact our Business Development Team at sales@brokerbuildersolutions.com.
