

Release Update – September 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

"Days Since" Retention on Reports

Streamline has enhanced **Wizard (Client Implementations, Migrations, and Renewals)** reporting to retain the **Days Since** value after a wizard progresses from one step to the next.

Previously, once a step was completed and the wizard moved forward, the associated report no longer displayed the number of days spent on that completed step.

For example, in the **Renewals Report**, once a renewal progressed beyond the **Client Information, Plans Checklist, or Demo Environment** steps, the **Days Since** value for those completed steps was no longer displayed.

For **compliance and tracking purposes**, Streamline will now retain the number of days associated with each completed step. This provides a historical record of how long the wizard remained in each stage of the process, even after it has progressed to subsequent steps.

Users can now more accurately review timelines, monitor turnaround times, and confirm that required activities were completed within expected timeframes.

Extended Wizard Close Functionality

Streamline introduced the ability to **close Wizards**—including **Client Implementations, Client Migrations, and Renewals**—in a previous release.

Previously, a Wizard could only be closed while it was on **Step 1 – Client Information**. This functionality has now been extended, allowing **Agency users** to close a Wizard from **any step within the process**.

We recognize that there may be situations where a Wizard begins but cannot be completed. For example, a client may decide not to move forward with an implementation or migration, or a renewal process may be discontinued after work has already begun.

Previously, if the Wizard had progressed beyond the **Client Information** step, there was no way to close it without completing the remaining steps. Extending the Close functionality allows **Agency users to accurately reflect the status of the Wizard without completing steps that are no longer applicable**.

This also helps keep open work more accurate by preventing Wizards that are no longer active from continuing to appear as work that still requires action.

How to Close a Wizard

The **Close** option can be found within the **Information** dropdown section of each step of the Wizard.

To close a Wizard, select the **Edit pencil** next to **Status**. Once the edit window opens, enter the **required comment explaining why the Wizard is being closed without completion**, and then select **Close** and then **Confirm Close**.

Once a Wizard has been closed, **Agency users** also have the option to **delete the Wizard**.

Closing or deleting a Wizard is permanent and cannot be reversed.

New Carriers

As part of our continued efforts to expand and maintain the carrier options available within Streamline, we have added **three new carriers**:

- **CBA Blue**
- **Healthy Dollars, Inc.**
- **Northeast Delta Dental**

These carriers are now available for selection within Streamline wherever carrier information is used, helping users more accurately set up and manage their organizations, companies, plans, and related processes.

Ben Ops and Data Solution Areas

Task Numbers

Streamline is excited to introduce **Task Numbers** for all wizards and tasks.

Each wizard and task will now be assigned a unique, system-generated **Task Number**, making it easier to identify, reference, and track specific items within Streamline.

The Task Number is automatically created using a combination of the **Organization Identifier** and an **auto-incrementing number**, providing a unique reference for each wizard or task.

The **Task Number is also available in most tables throughout Streamline** and can be included when exporting table data. This provides an additional way to identify, track, and reference specific wizards and tasks outside of Streamline.

The **Task Number is also available as a token within email templates**, allowing it to be included in automated email communications.

The Task Number is **not automatically added to existing email templates**. Users who have access to the functionality to **customize email templates** can add the **Task Number token** to the default email templates. The token can be inserted in either the **subject line** or the **body of the email**, depending on where users would like the Task Number to appear.

Audit Task File Upload Limit Increased

Streamline has increased the **file upload limit for Audit Tasks from 3 files to 10 files**.

Users can now upload up to **10 files** to an Audit Task, providing greater flexibility when multiple files are needed to complete an audit.

This is especially helpful in situations where a carrier file is provided as **multiple smaller invoices or census files**, allowing all related files to be uploaded and maintained within the same Audit Task.

Task Observers

Streamline is excited to introduce **Task Observers** for **Eligibility Management, Support, and Audit Tasks**.

An **Observer** is a user who is not the responsible party (**Assignee**) or the **Task Creator**, but who has been added to the task to stay informed of its activity.

Observers can be **Agency or Organization users**, and **multiple Observers** can be added to a single task.

Task Observers provide greater visibility and collaboration by allowing additional users to follow a task without being responsible for completing it.

This is especially helpful when multiple team members need to remain informed about the progress of a task, but do not need to be assigned responsibility for completing it.

Task Observers will receive **email notifications** at key points throughout the life of the task, including when:

- The task is **created**
- **Comments are added** to the task
- The task is **closed**

Because an Observer is not responsible for completing the task, the task will **not appear in the Observer's My Open Items section**.

Observers will, however, receive notifications within their **Notifications section**, allowing them to stay informed of task activity without adding the task to their individual workload.

Ability to Close an Incomplete Task

Streamline has introduced the ability to **close an incomplete Eligibility Management, Support, or Audit Task**.

Many tasks contain required fields that must normally be completed before the task can be marked as **Completed**. In situations where a task cannot be completed—for example, when a file implementation begins but is stopped before completion—users can now **close the task without entering dummy information simply to satisfy the required fields**.

When an incomplete task is closed, its status will display as **Closed** rather than **Completed**. This provides a clear distinction between a task that successfully completed the normal workflow and one that was closed before all required steps were completed.

A **Closed** task can also be **reopened** if work needs to resume at a later time.

For **Audit Tasks**, additional functionality has been added for linked audits that are still on the **Import File** step within the audit itself.

When closing an Audit Task at this stage, **linked audit** is automatically deleted while retaining the Audit Task. Previously, the linked audit could not be closed or deleted without deleting the Audit Task itself.

Deleting the linked audit removes the incomplete audit from the user's **My Open Items** while preserving the associated Audit Task and its history.

If the **Audit Task is reopened**, Streamline will automatically create a **new linked audit** and associate it with the reopened task.

Increased File Size and Quantity Limits

Streamline has enhanced **file upload capabilities for both Tasks and Wizards** to provide users with greater flexibility when uploading supporting documentation.

The maximum **file size has been increased to 32 MB** for uploads within both **Tasks and Wizards**. Additionally, the **file upload quantity has been increased to 60 files** within Wizard areas that provide a standalone file upload option.

The increased 60-file limit applies to standalone upload areas such as the **Plans Checklist** within **Renewals and Client Implementations** and the **Client Information** step within **Client Migrations**.

What This Means for Users

Users can now upload **larger files across both Tasks and Wizards** and, within designated Wizard areas, upload a greater number of files as part of the process.

This enhancement is especially helpful when supporting documentation is received across multiple files or when individual files exceed the previous upload size limit.

Please Note: File uploads attached directly to a **comment** will continue to be limited to **5 files per comment**. The increased limit of **60 files** applies only to areas within a Wizard that provide a **standalone file upload option**.



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.
