STREAMLINE

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DATA MANAGEMENT SOLUTIONS

Release Update – *November 9, 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 and Data Solution Areas

Enhanced Organization User Task Functionality

We are excited to introduce expanded task functionality for Organization users in Streamline, providing greater flexibility and control over task creation, assignments, and management.

Previously, Organization users were limited to creating Issue Task Types within the Eligibility Manage Task Module, along with limited functionality in the Support and Audit Task Modules. Additionally, task assignment options were restricted across all task modules, with tasks automatically assigned to the connected Agency Administrator.

With this enhancement, Organization users now have greater independence in managing tasks and collaborating with their connected Agencies and fellow Organization users.

Key Enhancements

- Expanded Task Creation: Organization users can now create any available task type in Streamline, rather than being limited to Issue, Support, and Audit Tasks.
- Expanded Task Assignments: Organization users can now be assigned tasks by Agency users or other Organization users.
- Flexible Task Assignment: Organization users who create a task can now assign it to other Organization users or an Agency, rather than having tasks automatically assigned to the connected Agency Administrator.
- Task Collaboration: When an Agency user creates a task of any type and assigns it to an Organization user, the assigned Organization user can add comments, upload supporting documents, and complete and close the task. However, Organization users cannot change the assignee on tasks created by an Agency user.
- Task Management and Completion: Organization users can now Save, Complete, and Close tasks in which they are either the creator or an assignee.

These enhancements apply to all Organization users, with the exception of Organization Verifier Access Only users. Users with the Organization Verifier Access Only role will retain their existing access and permissions.

With expanded task creation, assignment, collaboration, and completion capabilities, Organization users can manage their workflows more independently while working more effectively with Agencies and other Organization users. These improvements help streamline task management, reduce administrative bottlenecks, and promote greater efficiency across Streamline.

New QA Task Module

We are excited to introduce a new **QA Task module** in Streamline, designed to help agencies manage and track their internal quality assurance processes.

The new QA Task provides agencies with a dedicated task type for conducting quality assurance reviews across several areas, including **Client and File Implementations, Client Migrations, Client and File Renewals, and ACA**. An **Other** task type is also available for quality assurance activities that do not fall within one of these specific categories.

Key Features

- **Agency-Only Visibility:** QA Tasks are visible exclusively to Agency users, ensuring internal quality assurance activities remain separate from Organization and Company users.
- **Linked Tasks:** QA Tasks can be linked to Client Implementations, Client Migrations, and Client Renewals, allowing agencies to track quality assurance activities alongside their related tasks.
- **Agency-Level Assignments:** QA Tasks can only be assigned to Agency users or Agencies, keeping responsibility for quality assurance within the agency.
- **Multiple QA Categories:** Dedicated QA task types are available for Client and File Implementations, Client Migrations, Client and File Renewals, ACA, and Other, providing flexibility to accommodate a variety of quality assurance needs.

This enhancement provides agencies with a more structured and centralized approach to managing internal quality assurance reviews, improving task organization, accountability, and visibility throughout their processes.

Client Renewal Wizard: Enrollment Firm Fields Language

We have made a small but helpful improvement to the **Enrollment Firm Fields** section on the Client Information step within the Client Renewal task.

Previously, the instructional language was only visible after expanding the **Enrollment Firm Fields** dropdown. With this enhancement, the language has been relocated to appear **directly beneath the Enrollment Firm Fields heading**, making it visible without having to expand the dropdown.

This update improves visibility and ensures users can easily review the instructions without additional clicks.

Client Renewal Wizard: Reporting Submission Date

We have added a new optional Reporting Submission Date field on the Client Information step within the Client Renewal Wizard in Streamline.

This field allows users to track the date by which Open Enrollment (OE) reports need to be submitted to a carrier, vendor, or other entity.

By capturing this date directly within the Client Renewal Wizard, agencies can better manage reporting deadlines, stay organized, and help ensure timely submission of required Open Enrollment reports.

Client Renewal Wizard: New Plan Name Field

We have added a new “New Plan Name” field to the GA Review Plans checklist step within the Client Renewal Wizard in Streamline.

This enhancement allows General Agents (GAs) to enter or copy an updated plan name for the upcoming plan year without immediately changing the existing plan name.

Key Features

- New Plan Name Field: GAs can enter or copy the updated plan name for the upcoming plan year.
- GA Review Plans Checklist: The new field is available exclusively within the GA Review Plans checklist step of the Client Renewal Wizard.
- Delayed Name Update: The updated plan name will not take effect until the Client Renewal Wizard is closed, allowing the existing plan name to remain unchanged throughout the renewal process.

This enhancement provides GAs with a convenient way to prepare plan name updates during the renewal process while ensuring changes are applied at the appropriate time.

Client Implementation Wizard: Additional Client Information Fields

We have added several new optional fields to the Client Information step within the Client Implementation Wizard in Streamline.

New Optional Fields

- Company SIC Code: Capture the client's Standard Industrial Classification (SIC) code.
- Company Structure: Record the client's business or industry type such as LLC, C-Corp, etc.
- Payroll Provider: Identify the payroll provider/vendor used by the client.
- Upload Company Logo/Documents: Upload supporting documents and company logos directly within the Client Information step.

These enhancements provide agencies with a more comprehensive way to capture and organize important client details during the implementation process. By keeping this information and supporting documents in one convenient location, agencies can improve documentation, streamline workflows, and ensure key client information is readily accessible throughout the implementation.

New Agency Wizard User Role

We are excited to introduce a new Agency Wizard user role in Streamline, providing agencies with greater flexibility in managing user access across Organizations.

The new Agency Wizard role offers the same functionality and permissions as an Agency Administrator, but with access restricted to specifically authorized (whitelisted) Organizations.

Key Features

- Agency Administrator Functionality: Agency Wizard users have the same capabilities and permissions as Agency Administrators within their authorized Organizations.

- Organization-Level Access: Unlike Agency Administrators, whose access extends across their connected Organizations, Agency Wizard users are limited to Organizations for which they have been specifically whitelisted.
- Controlled Visibility: Agency Wizard users can only access information and perform actions within their authorized Organizations.
- User Creation: Agency-level users, including those assigned the new Agency Wizard role, can only be created by Streamline Administrators. Agencies requiring a new Agency Wizard user must contact the Streamline team for assistance at support@dms-datavalidate.com.

This enhancement allows agencies to provide users with full administrative functionality while maintaining control over which Organizations they can access, offering greater flexibility and security in managing user permissions.

Expanded Support Task Types

We have expanded the available **Support Task Types** in Streamline to include a new **HR Training** option.

This new task type can be selected from the **Task Type** dropdown when creating a Support Task, providing users with a dedicated option for tracking and managing HR training requests.

This enhancement helps improve task organization by allowing HR training activities to be easily identified, assigned, and tracked within the Support Task Module.

Added Task Due Date Functionality

We have added a new Task Due Date field to the Eligibility Management, Support, Audit, and QA Task Modules in Streamline, providing users with an additional way to track and manage important task deadlines.

Key Features

- Task Due Date: Users can now specify a due date when creating or managing tasks within the Eligibility Management, Support, and Audit Task Modules.
- Required Comments for Date Changes: When an existing Task Due Date is modified, users are required to enter a comment explaining the change.
- Previous Due Date Tracking: Streamline automatically captures the previous due date whenever a change is made, allowing users to reference the most recent adjustment.
- Date History Limitations: Streamline retains only the current due date and the immediately preceding due date. A complete history of all previous due date changes is not maintained.

This enhancement helps improve deadline visibility and accountability by allowing users to track task due dates, document changes, and reference the most recent due date adjustment.

New Audit Task Type: Carrier Key Take Over

We are excited to introduce a new Audit Task Type in Streamline: Carrier Key Take Over!

This new task type is specifically designed for situations where responsibility for manually processing carrier enrollments is transitioning from one individual, broker, company, or other entity to another.

The Carrier Key Take Over task follows the same basic setup as other Audit Task Types but includes additional fields to help track important dates and details throughout the transition.

As with other Audit Task Types, a linked audit task is automatically created. Conducting an audit during a carrier key takeover or implementation is a best practice to help ensure the enrollment data is accurate and any discrepancies are identified before assuming responsibility for ongoing processing.

Required Fields for Task Creation

When creating a Carrier Key Take Over task, the following fields are required:

- Task Name
- Task Takeover Date
- Processing Type
- First Requested Process Date

Required Fields for Task Completion

Before the Carrier Key Take Over task can be completed, the following additional fields must be populated:

- Actual First Processing Date
- Credentials Received Date
- Date Changes Last Processed by Broker, Company, or Other Entity
- Carrier Change

Additional Optional Fields

The following optional fields are also available to help capture additional information and support the takeover process:

- **Post Open Enrollment Processing Date**
- **Carrier Login URL**
- **Upload Files**
- **Task Observers**
- **Task Due Date**
- **Comments**
- **Supplemental Information**

These optional fields provide additional flexibility for documenting important details, attaching supporting files, and keeping relevant team members informed throughout the transition.

This enhancement provides a more structured approach to managing carrier key takeovers, helping teams track critical milestones, document the transition of processing responsibilities, and ensure data accuracy from the start.

Ability to Link Tasks and Wizards

We have added new functionality in Streamline that allows users to **link QA and Support Tasks directly to Client Implementation, Client Renewal, and Client Migration Wizards**.

This enhancement provides a more organized way to track related tasks, document important information, and maintain visibility throughout the implementation, renewal, and migration processes.

Key Features

- **Linked Tasks:** QA and Support Tasks can now be linked to their associated Client Implementation, Client Renewal, or Client Migration Wizard.
- **Task Type-Based Linking:** The ability to link a task to a wizard is determined by the Task Type selected when creating the QA or Support Task.
- **Linked Task Counts**: The number of linked Support Tasks is displayed in the Implementation, Renewal, and Wizard tables, allowing users to quickly identify how many related tasks are associated with each wizard.
- **Linked Task Visibility Within Wizards**: Linked tasks can also be viewed directly within their associated wizard under the newly renamed Information and Linked Task overview. Previously called the Information card, this section is available on every step of the wizard, providing convenient access to related tasks throughout the process.

Supported Task Types

Task Module	Task Type	Linked Wizard
Support	Implementation Notes	Client Implementation
Support	Migration Notes	Client Migration
Support	Renewal Notes	Client Renewal
QA	Implementation	Client Implementation
QA	Migration	Client Migration
QA	Renewal	Client Renewal

By connecting related tasks and wizards, this enhancement helps improve organization, streamline communication, and provide greater visibility into supporting activities throughout the client lifecycle.

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.