

Release Update – May 14

Data Management Solutions is pleased to announce this week's enhancements and fixes to our Data Validation Platform. Each enhancement/fix is separated by Applicable Users (subscribers who are directly affected by the enhancement or the fix) for easier viewing.

New + Improved

Applicable users: All Users

Exclude/Exclude All

We have added functionality to the Verify Missing Data step with the inclusion of an Exclude radio button for each entry and Exclude All button for all records. The Exclude ALL button can be used to select/deselect all entries. This allows the user to quickly select/deselect instead of manually unchecking each entry. If neither include nor exclude is selected, the entry will not be included in the export files in step 8. Please be sure to check Include if the entry needs to be added to the export files.

Display/Full Name

We improved how the platform handles concatenated names like "Benefits, Julia" when they are used as single data points. Previously, if the import files didn't have separate columns for first name and last name, the platform was not able to display this information in the tables for "Verify Discrepancies" and "Verify Missing Data." This lack of display made it difficult to identify members by name.

With the enhancement, the platform now recognizes concatenated names and displays them in the respective tables. So, using "Benefits, Julia" as an example, this full name would be shown in the tables, allowing users to easily identify members by name even when the data is in a concatenated format.

This improvement enhances usability and streamlines the verification process, especially when dealing with datasets where names are stored in concatenated form. It ensures that users can effectively work with the data regardless of its original formatting.

Notification Emails for Auditor and Verifier

We are introducing an email notification enhancement to the Data Validation Platform. This enhancement aims to improve communication and streamline the audit verification process by notifying relevant parties when certain actions occur.

Here's how the enhancement works:

Audit Assignment Notification: When an audit is assigned to a verifier, an email notification is triggered to inform the verifier that the audit is ready for verification. This notification ensures that verifiers are promptly made aware that the audit is now available.

Verification Completion Notification: Once the verification process is completed by the assigned verifier, another email notification is sent to the auditor, indicating that the verification process has been finalized. This notification helps in keeping both users informed about the progress and status of the audit.

Assigning Verifiers: Verifiers can be assigned during either the "Verify Discrepancy" step or the "Verify Missing Data" step of the audit process. This flexibility allows for efficient assignment based on the specific requirements of each audit. Once the verifier is saved, an email is automatically sent.

User Assignment Permissions: Users from the same level and below, such as organization and company, can be assigned as verifiers. This ensures that the verification process can be delegated effectively within the organizational hierarchy.

Limitations for Company Admin Users: In the Platinum Elite subscription tier, company admin users have additional privileges. However, they are restricted from assigning organization users. This restriction helps maintain control over user assignments and ensures that only authorized personnel handle verification tasks at the organizational level.

Applicable users: *Organization Admins and Compare Users*

Masked SSNS

We have implemented functionality to identify and handle masked social security numbers. This feature helps in situations where data points contain obscured or partially hidden social security numbers, either through hyphens or asterisks. This prevents manual cleanup in the files prior to importing into the Platform.

If either the baseline or secondary file data point meets the criteria of containing a masked social security number and is one of the defined keywords listed below, the platform will then only use the last four digits of the number from both files for comparison purposes.

- ssn
- social security number
- socialsecuritynumber
- ss#
- social security #
- ee id
- member id

Removal of Suffixes in Names

We have enhanced the Platform to automatically handle the removal of suffixes from names. This feature aims to streamline the data import process by eliminating the need for manual cleanup before importing and reduce the number of false positive discrepancies

By using a pre-determined keyword set that includes common suffixes such as Jr, Sr, II, III, IV, and V, the platform can identify and remove these suffixes from names automatically. This automated approach reduces the risk of human error by manually removing and saves time, ensuring that the imported data is clean and consistent without requiring additional manual intervention.

Removal of special characters in Names

We have implemented a feature to remove special characters from names within the Platform. By stripping away special characters and retaining only alphanumeric characters, this enhancement aims to minimize the manual cleanup required before importing data. Reducing manual cleanup helps streamline the import process and saves time for users.

This feature standardizes the format of names, making it easier to accurately compare and match records. This approach significantly improves data consistency and reduces the likelihood of false positive discrepancies during comparisons.

Fixes

Applicable users: All Users

Saving Notes to Verify Discrepancy Data Step

There was unintended behavior in the Platform related to saving notes in the "Verify Discrepancy" step. Previously, when saving notes without selecting any resolution value (baseline, secondary, free form, or ignore), the Platform defaulted to an empty resolved value.

To address this issue, the Platform has been corrected. Now, when saving notes without selecting a resolution value, the Platform will not default to any value. This allows auditors to add notes without inadvertently selecting a resolution option. However, the "Verify Discrepancy" step will remain greyed out until a resolution value is selected for verification purposes. This ensures that the verification process proceeds smoothly and accurately, without any unintended selections or actions.

Applicable users: Organization Admin

Import companies

We have identified and corrected an issue with importing companies into the Platform. This feature was unintentionally disabled during the recent design changes. By correcting this oversight, users can once again import companies seamlessly into the platform without manually adding them.

Coming Soon!

Upcoming enhancements to the Platform:

1. Discrepancy Type Dropdown
2. Additional Discrepancy report that includes all other fields from the import file
3. Carrier Tracking at Company Level
4. Upload User: Ability to create a user that can upload files directly to the platform for comparison.
5. Upload Library: Ability to upload files directly to the platform to be used for audit purposes.

If you would like to submit a request for a future enhancement, please [Click Here](#) to initiate your request.

Reminders:

1. All support Inquiries should be directed to support@dms-datavalidate.com
2. Competing priorities making auditing an issue, please remember we offer our Audits on Demands and Subscription Based Audit services, allowing the Data Management Team to manage your audit workflow.

For more information, please visit our website at [AOD and SBA Packages | DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com/AOD-and-SBA-Packages) or contact sales@dms-datavalidate.com

3. If you have changed the plan names or carriers in your Ben Admin or Payroll system, this may impact your existing mapping structure.