Release Update – *November 26th*

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*

Verifier and Auditor Memos for Emails

We have introduced additional **Verifier** and **Auditor Memo** sections within the comparison process. These sections allow users to include supplementary information in the system-generated emails, such as Identified global issues, details of manual adjustments made prior to importing, any other relevant information.

Key Features:

- **Optional but Informative**: While optional, these memos provide valuable context for both the verifier and auditor.
- **Automatic Inclusion**: Both memos are automatically included in the default system-generated emails.

Locations:

- **Verifier Memo**: Accessible in **Step 6 Verify Discrepancies** and **Step 7 Verify Missing Data** within the **Verifier Memo dropdown** directly above the NEXT and SAVE buttons.
- **Auditor Memo**: Found in **Step 5 Compare** within the **Comparison Details dropdown**.

These enhancements aim to improve communication and provide better insight into the comparison process between both the auditor and verifier.

Full Discrepancy Report

We have introduced an additional **Discrepancy Report** in **Step 5 Compare**. This report displays **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.

This enhancement provides greater flexibility and detail, enabling more comprehensive data analysis and support for complex use cases.

Carrier Reporting Guides

We are excited to announce that **Carrier Reporting Guides** are now available thru the [DMS Resource Center Knowledge Base](#)!
These guides are designed to assist comparers in navigating and addressing challenges with carrier files that are difficult to manipulate due to formatting or layout issues.

The guides outline the most effective methods to pull and prepare carrier files for comparison and provide guidance on the best file types to pull from the Benefit Administration Platform for seamless processing.

These guides aim to streamline workflows, reduce errors, and improve efficiency when working with complex carrier files.

Applicable users: *Organization Admins*

Additional Company Fields and Export Ability

We are excited to share enhancements to the **Company** section, including new fields and improved functionality for better company tracking and management.

New Fields Added:
1. **Activation Date**
2. **First Demo Date**
3. **Termination Date (Available when Active is unchecked)**
4. **Termination Reason (Available when Active is unchecked)**

Export Capability:
- You can now export company information directly from the **Companies** table.
- ALL Organization Level users including Comparers and Verifier can export company information
- **Export Options**:
  - Download as a **CSV file**.
  - Print the exported data.
- The exported file will include:
  - Company name.
  - Active status.
  - Updated at timestamp.
  - Termination date and reason.
  - Activation date.
  - First demo date.
  - Any associated notes.

These updates are designed to provide a more comprehensive view of company information and streamline data management.

Applicable users: *Organization and Company Admins*

Customized Email Templates

We are pleased to announce a new feature enabling **customized emails** for verifiers and auditors at both the **organization** and **company** levels. Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.

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 Platform will use the **organization-level customization**.
   - **Default System Emails**: If no customization is made at either level, the Platform will default to the system-generated email.

This enhancement provides greater flexibility and control over communication, ensuring that email content aligns with your organization's needs.

Fixes

Applicable users: *All Users*

Renamed NOTES to SETUP NOTES

We have updated the **Notes** section in **Step 1 Create**, renaming it to **Setup Notes**.

This change helps users distinguish between notes added during the creation step and those used in later stages such as **Verifier and Auditor Notes** used during verification and the newly added **Verifier and Auditor Memos** included in the system generated emails.

This update improves clarity and organization, ensuring that notes are used effectively at each stage of the process.

Coming Soon!

Upcoming enhancements to the Platform:

1. Upload User: Ability to create a user that can upload files directly to the platform for comparison.

2. Upload Library: Ability to upload files directly to the platform to be used for audit purposes.

3. Email Tracking: Ability to track when verification and completion emails have been sent.

4. Carrier Invoice Conversion Process

5. Mapping search functionality

6. Mapping edit functionality for in-use mappings.

7. Mapping import functionality.

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

Reminders:

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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)](#) 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.