Data Validation Platform

Company User Guide

Table of Contents

Login

The Data Management Solutions – Data Validation Platform can be accessed from https://dms-datavalidate.com/ using supplied username or registered email address. A temporary password is provided in the registration email and requires update during the registration process.

Registration Email Example:

notifications@dms-datavalidate.com via amazonses.com

To: You

Tue 12/3/2024 2:02 PM

Thank you for subscribing to the Data Management Solutions- Data Validation Platform (DVP). Please use the following link to begin the user registration process; https://datamanagement.dms-datavalidate.com Your username is [redacted] and temporary password is [redacted] Please do not hesitate to contact our team with any questions, support@dms-datavalidate.com.

Reply   Forward

Users

The Data Validation Platform supports six (6) user types, each with varying levels of access and functionality:

1. **Organization Admin – Full Access**
   Provides complete access to all features within the platform, including the ability to add and deactivate users.

2. **Organization Comparer – Limited Access**
   Allows full compare and merge functionality, but only for designated (whitelisted) companies. This role does not have the ability to add new companies.

3. **Organization Task Manager – Limited Access**
   Grants the same permissions as the Organization-Level Comparer, excluding access to compare and merge functions.

   Note: This user type does not count against your licensed user seats. You may create an unlimited number of Task Managers.

4. **Organization Verifier – Partial Access**
   Permits verification of discrepancies and missing data for existing compares. Compare and merge functionality is not available for this role.

   Note: This user type does not count against your licensed user seats. You may create an unlimited number of Organization Verifiers.

5. **Company Admin – Limited Access** *(Platinum Elite Plan only)*
   Offers full compare and merge capabilities, but only for the specific company under which the user is created. This role is exclusive to the Platinum Elite subscription.

6. **Company Verifier – Partial Access**
   Allows verification of discrepancies and missing data for existing compares within a single company. This role does not include compare and merge functionality.

   Note: This user type does not count against your licensed user seats. You may create an unlimited number of Company Verifiers.

Only Company level users are discussed in this set of instructions. Please reference the Organization Level User process document for information pertaining to that level.
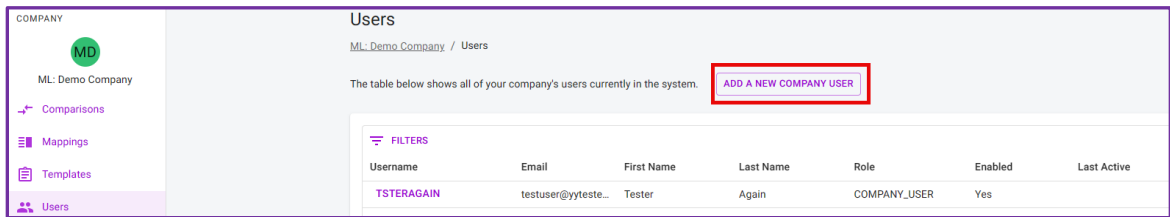
Adding a Company Level Verifier user

Select Users in the left menu bar.
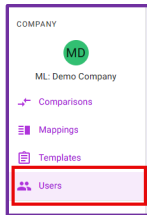
Select ADD A NEW COMPANY USER.

Enter all applicable information for the newly created user. Company admin users are restricted to creating company level verifiers only. The verifier access is limited to verifying discrepancies and missing data for existing compares only. No compare and merge functionality exists for this level.

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level
Company Verifier Access Only ▾

Role
☑ COMPANY_USER

SAVE

Once all applicable information has been entered click Save.

The user will then receive an auto-generated email with a temporary password and a link to register their account.

Create the **Compare Only**

Please note audit creation is restricted to Company Admin users which are only available under the Platinum Elite Plan. The compare process consists of several steps from naming the compare up to the completion of the comparison. Each step must be completed to advance through the compare process. All steps beyond Step 5 - Compare can be ignored if not needed. Prior completed steps with the <u>exclusion</u> of the compare creation can be revisited and reset if desired.

Create New Compare

Select NEW to begin a new comparison

Name the Compare

Enter the comparison name in the field provided. Select Audit Type from the dropdown and add Additional Notes if desired. Select Compare Only for the Comparison Type and click SAVE.

Please Note that once the comparison type is selected and saved, it cannot be changed.

Carrier Selection is only available under the Platinum Elite or Subscription Based Audits plans

Import Files

Import baseline and secondary files, select specific worksheets (if applicable), then click SAVE. If you use same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

Select Data Points & Create Import Template

Matching data points will be auto filled. Add and/or Delete data points as needed. Select a minimum of One (1) unique identifier. Click CLEAR ALL to delete all data points.

When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

Once all desired data points and unique identifier(s) have been selected, an import template can be created for future use by adding a template Name and clicking SAVE.

Select Data Points & Reuse Existing Template

Select an applicable data points template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the import file column names. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Select Data Points

Select the data points from each file to be included in the comparison. One or more data point pairs must be specified as the unique identifier for the record.

When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template
Demo Import Template

Base.xlsx baseline	Secondary.xlsx secondary		CLEAR ALL
Employee SSN	Employee SSN	☑ Unique Identifier	✕
Social Security Number	Social Security Number	☑ Unique Identifier	✕
First Name	First Name	☐ Unique Identifier	✕
Middle Name	Middle Name	☐ Unique Identifier	✕
Last Name	Last Name	☐ Unique Identifier	✕
DOB	DOB	☐ Unique Identifier	✕
Employment Status	Employment Status	☐ Unique Identifier	✕
Monthly Premium	Monthly Premium	☐ Unique Identifier	✕

+ ADD DATA POINT

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name

☐ Share with Organization

BACK   SAVE

PLEASE NOTE if utilizing a saved template, any changes made such as adding or deleting data points during the audit are temporary and will not be saved to the existing template.

A new template can be created by adding a new data points template name and clicking SAVE.

In the example provided below, the auditor utilized the Demo Import Template but then removed the DOB data point. This change is temporary and is not removed from the existing template. By adding a new template name, a new template is created without the DOB.

Mapping

Add customized mapping for data such as plans, tiers, or departments by utilizing the MAP buttons. Existing mappings for the company or created and shared at the DMS Admin or Organization level can be re-used or new mappings can be created.

To add a new mapping click NEW MAPPINGS. Add a mapping name and then enter the source value data as well as the target value by clicking ADD MAPPINGS. Multiple mapped values can be added.

Click SAVE MAPPINGS to newly created mapping to save.

If you use existing mapping, click SELECT MAPPINGS.

If the date is not formatted in the files as a date, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.

NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.

Mapping – Computation

Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function required.

The computation function will create a new column as a result of the computation in the downloadable Discrepancy Report and will be reflected in the discrepancy counts and discrepancy report tables.

Please note that this functionality will **ONLY** apply to numeric fields and then **ONLY** to data points that have **NOT** been selected as part of the unique identifier.

Only the subtraction (minus) results will continue through the remainder of the compare process. All other functions will end at Step 5.

Compare

Verify selected information and click COMPARE. Comparison Name, Carrier (if applicable), Audit Type, Setup Notes, and Auditor Memo can be edited. The Auditor Memo is automatically included in the email to the Verifier.

Compare

Please review the details of this comparison below.

Comparison Name Demo	✏ EDIT	**Audit Type**	✏ EDIT
Carrier	✏ EDIT	**Setup Notes**	✏ EDIT
Assigned Verifier Unassigned	✏ EDIT	**Auditor Memo**	✏ EDIT
Created By / Auditor maryl		**Verifier Memo**	
Current Step Compare		**Baseline File** base.xlsx	
Baseline Worksheet baseline		**Secondary File** second.xlsx	
Secondary Worksheet secondary		**Comparison Type** Compare Only	

Unique Identifiers ('base' - 'second')
First Name - First Name
Last Name - Last Name
Employee SSN - Social Security Number

Data Points ('base' - 'second')
Middle Name - Middle Name
DOB - Date of Birth {date format:'MM/dd/yyyy'}
Monthly Premium - Monthly Premium
Gender - Gender

Data Point Mappings ('base' - 'second' -> Mapping Name)
Gender - Gender -> Gender

Mappings (Source - Target)
Gender
   F - Female
   M - Male

[BACK] [COMPARE]

Compare is complete. Comparison results are available for view and for download by clicking the SELECT FILE TO DOWNLOAD. The original files can also be accessed from the dropdown as well as another discrepancy report where all data points are included for the row where a discrepancy was identified. If Verification is not needed, Compare can be closed by clicking OVERRIDE AS COMPLETE.

Verify Discrepancies

Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. A discrepancy type can also be selected from the dropdown. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Note in the Auditor Notes field.

Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

Data Management Solutions
Validate ▪ Create ▪ Convert

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

Verify Missing

Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to select/deselect all entries. If INCLUDE is selected, the entry will be included in the export files. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Notes in the Auditor Notes field and a specific discrepancy type can be selected in the Discrepancy Type dropdown. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

Assign a Verifier to the Compare

A verifier can be assigned to complete the comparison. To assign a verifier, select the Verifier Details dropdown. In the Verifier Details section, select the EDIT option for Assigned Verifier.

This will open up the comparison edit section. In the Assigned Verifier dropdown, select an applicable user. **An audit can be assigned to anyone who has access to the specific company and only to users with the same level access. For example, a Company Admin user can only assign an audit to other**

Company Admins or Company Verifiers within the same company. An Org Level user can assign to other users within the same organization and all company level users.

 A notification email containing Auditor name, Organization/Company Name, Audit Name, and a link to the specific audit is generated once a verifier has been assigned.

Hello {Verifier First Name},

{Auditor First Name and Last Name} at {Organization Name if Org Level or Company Name if Company Level User} has finished auditing your data and has designated you as the verifier for this comparison: {Comparison Name} for {Company Name}.

Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The notification email can be sent from either the Verify Discrepancy Step or the Verify Missing Data step.

A notification email can be resent if the audit has not reached the completion step (Step 8). To resend the notification email. Navigate to the Verifier Details and click EDIT for the Assigned Verifier. Click RESEND to resend the notification email to the currently assigned verifier.

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the Platform, the auditor will receive a notification email that the audit is complete.

Hello {Auditor First Name},

This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.

Please click here below to log in and complete the audit process.

{Verifier Memo}

Thank you,

On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The verified baseline and secondary files can be downloaded with all records including verified or verified records only by utilizing dropdown. If a discrepancy was ignored, the record **will not be included**

in the Verified records only download. The ignored record will continue to show in the All records including verified download.

Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the Platforms key words. For a list of the keywords, please reference the Key Words page.

Data Management Solutions
Validate ▪ Create ▪ Convert

Select file to export

Base ▾

Customize Export - 'Base' ⌃

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

	Original Name	Rename To	Format Values	Merged
☰	Employee SSN		▾	
☰	First Name			
☰	Last Name			
☰	DOB			
☰	Gender			
☰	Monthly Premium			
☰	Date of Hire			☰

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED   **EXPORT VERIFIED RECORDS ONLY**

BACK   **GO TO ALL COMPARISONS**

Column names can also be reordered by dragging and dropping data point in desired location.

Click SAVE CUSTOMIZATIONS if desired. Customization is also automatically saved when the export files (All Records Including Verified and Verified Records Only) are downloaded.

Export Template

Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming and saving the template. Once the template has been saved, it will be added to the template library for future use.

Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

Selecting export template:

Saving New Export Template:

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Export Template

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED   EXPORT VERIFIED RECORDS ONLY

BACK   GO TO ALL COMPARISONS

The data comparison and verification processes are complete. To see other comparisons or to begin a new one, click GO TO ALL COMPARISONS.

Questions: Contact Support@dms-datavalidate.com

Create the **Compare and Merge**

▼

Please note audit creation is restricted to Company Admin users which are only available under the Platinum Elite Plan. The compare process consists of several steps from naming the compare up to the completion of the comparison. Each step must be completed to advance through the compare process. All steps beyond Step 5 - Compare can be ignored if not needed. Prior completed steps with the <u>exclusion</u> of the compare creation can be revisited and reset if desired.

Create New Compare

Select NEW to begin a new comparison.

Name the Compare

Enter the comparison name in the field provided. Select Audit Type from the dropdown and add Additional Notes if desired. Select Compare & Merge for the Comparison Type and click SAVE.

Please Note that once the comparison type is selected and saved, it cannot be changed.

Carrier Selection is only available under the Platinum Elite or Subscription Based Audits plans

Import Files

Import baseline and secondary files, select specific worksheets (if applicable), then click SAVE. If you use same file for both baseline and secondary, click USE BASELINE FILE. Rename file names using 31 characters or less, if desired.

Select Data Points & Create Import Template

Matching data points will be auto filled. Add and/or Delete data points as needed. Select a minimum of One (1) unique identifier. Click CLEAR ALL to delete all data points.

When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

Once all desired data points and unique identifier(s) have been selected, an import template can be created for future use by adding a template Name and clicking SAVE.

Select Data Points

Select the data points from each file to be included in the comparison. One or more data point pairs must be specified as the unique identifier for the record.

When a masked SSN is used as one of multiple unique identifiers, only the last 4 digits will be considered.

Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

To merge a field from one file into the other, select the [merge] option for that field.

Select an applicable template below for the indicated data points. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

Apply a Data Points Template

Base.xlsx baseline	Secondary.xlsx secondary			CLEAR ALL
Employee SSN	Employee SSN	☑ Unique Identifier		✕
First Name	First Name	☑ Unique Identifier		✕
Last Name	Last Name	☑ Unique Identifier		✕
DOB	DOB	☐ Unique Identifier		✕
Monthly Premium	Monthly Premium	☐ Unique Identifier		✕
Gender	[merge]	☐ Unique Identifier		✕
[merge]	Date of Hire	☐ Unique Identifier		✕

+ ADD DATA POINT

Optionally, specify a name below if you wish to save these data points as a new Data Points Template, for re-use in later comparisons.

Data Points Template Name
Import Template with Merge

☑ Share with Organization

BACK   SAVE

To Merge a data point without comparing, select [merge] in the corresponding dropdown

Data Point	Date of Hire	☐ Unique Identifier	✕
+ ADD DATA POINT	[merge]		
	Employee SSN		
	Social Security Number		
	First Name		

Select Data Points & Reuse Existing Template

Select an applicable data points template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the import file column names. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding a template name. Once the template has been saved, it will be added to the template library for future use and can optionally be shared with the organization for reuse under other companies.

PLEASE NOTE if utilizing a saved template, any changes made such as adding or deleting data points during the audit are temporary and will not be saved to the existing template.

A new template can be created by adding a new data points template name and clicking SAVE.

In the example provided below, the auditor utilized the Demo Import Template but then removed the DOB data point. This change is temporary and is not removed from the existing template. By adding a new template name, a new template is created without the DOB.

Mapping

Add customized mapping for data such as plans, tiers, or departments by utilizing the MAP buttons. Existing mappings for the company or created and shared at the DMS Admin or Organization level can be re-used or new mappings can be created.

To add a new mapping click NEW MAPPINGS. Add a mapping name and then enter the source value data as well as the target value by clicking ADD MAPPINGS. Multiple mapped values can be added.

Click SAVE MAPPINGS to newly created mapping to save.

If you use existing mapping, click SELECT MAPPINGS.

Mapping can also be added to Merged data points using the same process. The Source value will contain the original value from the file while the Target value will be what the data will be changed to in the export files.

If the date is not formatted in the files as a date, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.

NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.

Mapping – Computation

Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function required.

The computation function will create a new column as a result of the computation in the downloadable Discrepancy Report and will be reflected in the discrepancy counts and discrepancy report tables.

Please note that this functionality will **ONLY** apply to numeric fields and then **ONLY** to data points that have **NOT** been selected as part of the unique identifier.

Only the subtraction (minus) results will continue through the remainder of the compare process. All other functions will end at Step 5.

Compare

Verify selected information and click COMPARE. Comparison Name, Carrier (if applicable), Audit Type, Setup Notes, and Auditor Memo can be edited. Please note that the Auditor Memo is automatically included in the email to the Verifier.

Compare is complete. Comparison results are available for view and for download by clicking the SELECT FILE TO DOWNLOAD. The original files can also be accessed from the dropdown as well as another discrepancy report where all data points are included for the row where a discrepancy was identified. If Verification is not needed, Compare can be closed by clicking OVERRIDE AS COMPLETE.

View Reports

The comparison process has finished. You can download the discrepancy reports and original files below, or proceed to verify any discrepancies.

Select file to download ▾

Comparison Details ⌄

Discrepancy Counts by Data Point

'base'	'second'	Computation Function	Count
First Name	First Name		2
Last Name	Last Name		1
Employment Status	Employment Status		1
Monthly Premium	Monthly Premium	minus: baseline - secondary	1

Missing Counts

Missing from 'base'	Missing from 'second'
0	1

Discrepancy Report

First name	Last name	Relationship	Unique Identifier	'base' row / data point	'second' row / data point	'base' value	'second' value	Computation Function Result
Katherine	Aldridge		9160_217219160	4 / Monthly Premium	4 / Monthly Premium	654.98	259.55	395.43
	Benefits		1234_555661234	13 / First Name	13 / First Name	Julia	JuliaAnne	
	Demo		9696_555129696	52 / First Name	52 / First Name	Wednesday	Monday	
Eric	Fisherly		7840_217217840	67 / Employment Status	67 / Employment Status	Termed	Active	
Jasmine			1335_555421335	44 / Last Name	44 / Last Name	Delete	Donald	

Rows per page: 5 ▾   1–5 of 5   ‹ ›

Missing Report

First name	Last name	Relationship	Unique Identifier	'base' row	'second' row	Duplicate unique identifier row
Tricia	Yang		0260_217220260	203		

Rows per page: 5 ▾   1–1 of 1   ‹ ›

BACK   NEXT   RESET   OVERRIDE AS COMPLETE

Verify Discrepancies

Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. A discrepancy type can also be selected from the dropdown. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Note in the Auditor Notes field.

Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

Verify Missing

Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to select/deselect all entries. If INCLUDE is selected, the entry will be included in the export files. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to Discrepancy Type / Notes in the Auditor Notes field and a specific discrepancy type can be selected in the Discrepancy Type dropdown. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

Assign a Verifier to the Compare

A verifier can be assigned to complete the comparison. To assign a verifier, select the Verifier Details dropdown. In the Verifier Details section, select the EDIT option for Assigned Verifier.

This will open up the comparison edit section. In the Assigned Verifier dropdown, select an applicable user. **An audit can be assigned to anyone who has access to the specific company and only to users with the same level access. For example, a Company Admin user can only assign an audit to other**

Company Admins or Company Verifiers within the same company. An Org Level user can assign to other users within the same organization and all company level users.

A notification email containing Auditor name, Organization/Company Name, Audit Name, and a link to the specific audit is generated once a verifier has been assigned.

Hello {Verifier First Name},

{Auditor First Name and Last Name} at {Organization Name if Org Level or Company Name if Company Level User} has finished auditing your data and has designated you as the verifier for this comparison: {Comparison Name} for {Company Name}.

Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The notification email can be sent from either the Verify Discrepancy Step or the Verify Missing Data step.

A notification email can be re-sent if the audit has not reached the completion step (Step 8). To resend the notification email. Navigate to the Verifier Details and click EDIT for the Assigned Verifier. Click RESEND to resend the notification email to the currently assigned verifier.

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the Platform, the auditor will receive a notification email that the audit is complete.

Hello {Auditor First Name},

This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.

Please click here below to log in and complete the audit process.

{Verifier Memo}

Thank you,

On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The verified baseline and secondary files can be downloaded with all records including verified or verified records only by utilizing dropdown. If a discrepancy was ignored, the record **will not be included** in the Verified records only download. The ignored record will continue to show in the All records including verified download.

Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the Platforms key words. For a list of the keywords, please reference the Key Words page.

Select file to export

Base ▼

Customize Export - 'Base' ⌃

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

	Original Name	Rename To	Format Values	Merged
＝	Employee SSN		▼	
＝	First Name			
＝	Last Name			
＝	DOB			
＝	Gender			
＝	Monthly Premium			
＝	Date of Hire			☰

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED   **EXPORT VERIFIED RECORDS ONLY**

BACK   **GO TO ALL COMPARISONS**

Column names can also be reordered by dragging and dropping data point in desired location.

Click SAVE CUSTOMIZATIONS if desired. Customization is also automatically saved when the export files (All Records Including Verified and Verified Records Only) are downloaded.

Export Template

Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming and saving the template. Once the template has been saved, it will be added to the template library for future use.

Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

Selecting export template:

Select file to export

Base ▾

Customize Export - 'Base'   ⌃

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Select an applicable template below for the export customizations. If a template is NOT available, one can be created by adding all desired customizations (renaming, reordering, formatting) and adding a template name. Once the template has been saved, it will be added to the template library for future use.

No applicable Export Templates

Saving New Export Template:

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Export Template

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED   EXPORT VERIFIED RECORDS ONLY

BACK   GO TO ALL COMPARISONS

The data comparison and verification processes are complete. To see other comparisons or to begin a new one, click GO TO ALL COMPARISONS.

Questions: Contact Support@dms-datavalidate.com

Company Verifier Process

Select company

Select the comparison to verify the audit.

Verify Discrepancies

Verify Discrepancy Data entries are identified by the system when the unique identifier from one file is matched to an entry in the opposing file and one or more of the remaining data points do not match. Verify the data discrepancies by selecting the existing value, creating new, or ignoring. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to POST YOUR NOTES in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Verifier Details ⌄

First name	Last name	Relationship	'Base' row / data point	'Secondary' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Post Your Notes
Katherine	Aldridge		4 / Monthly Premium	4 / Monthly Premium	○ 654.98 ○ 259.55 ○ Overwrite ○ Ignore	--	Auditor notes: Premium not the same in carrier as the Ben Admin System. Verifier notes:

If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)

Verify Discrepancies

Verify the discrepancies below by selecting the correct value for each discrepancy. You can save your progress at any time.

All discrepancies and missing data can be assigned to a specific user either from the Verify Discrepancy or the Verify Missing Data step.

Please use the Verifier Details dropdown to assign a user to review and verify discrepancies.

Please note an email will be sent to the verify user immediately upon saving the assignment.

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

Verify Missing

Verify Missing Data entries are identified by the system when the unique identifier from one file cannot be found in the other. If the entry needs to be included, check Include? For a shortcut, click INCLUDE ALL or EXCLUDE ALL to select/deselect all entries. If INCLUDE is selected, the entry will be included in the export files. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to POST YOUR NOTES in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the Platform, the auditor will receive a notification email that the audit is complete.

> Hello {Auditor First Name},
>
> This is to inform you that the assigned verifier, {Verifier First Name and Last Name}, has finished verifying the discrepancies for your comparison: {Comparison Name} for {Company Name}.
>
> Please click here below to log in and complete the audit process.
>
> {Verifier Memo}
>
> Thank you,
>
> On behalf of {Verifier First Name and Last Name}, {Organization Name if Org Level or Company Name if Company Level User}
>
> This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

The verified baseline and secondary files can be downloaded with all records including verified or verified records only by utilizing dropdown. If a discrepancy was ignored, the record **will not be included** in the Verified records only download. The ignored record will continue to show in the All records including verified download.

Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the Platforms key words. For a list of the keywords, please reference the Keys Words page.

Column names can also be reordered by dragging and dropping data point in desired location.

Click SAVE CUSTOMIZATIONS if desired. Customization is also automatically saved when the export files (All Records Including Verified and Verified Records Only) are downloaded.

Export Template

Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming and saving the template. Once the template has been saved, it will be added to the template library for future use.

Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

Selecting export template:

Saving New Export Template:

Optionally, specify a name below if you wish to save these export customizations as a new Export Template, for re-use in later comparisons.

Export Template Name

Export Template

☑ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED   EXPORT VERIFIED RECORDS ONLY

BACK   GO TO ALL COMPARISONS

The data comparison and verification processes are complete. To see other comparisons, click GO TO ALL COMPARISONS.

Questions: Contact Support@dms-datavalidate.com

Email Customization

The Data Validation Platform has 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.

Verifier Email

To customize the verifier email, click on the Template Library on either the Organization or Company Level and then EMAIL

Select COMPARISION TO VERIFIER from the dropdown menu

Click the edit icon (✎). Please note that if a trashcan icon (🗑) is available, there is current customization in place for this email.

Add customized language to the subject line as well as the body. Tokens are available as well and can be added to the email.
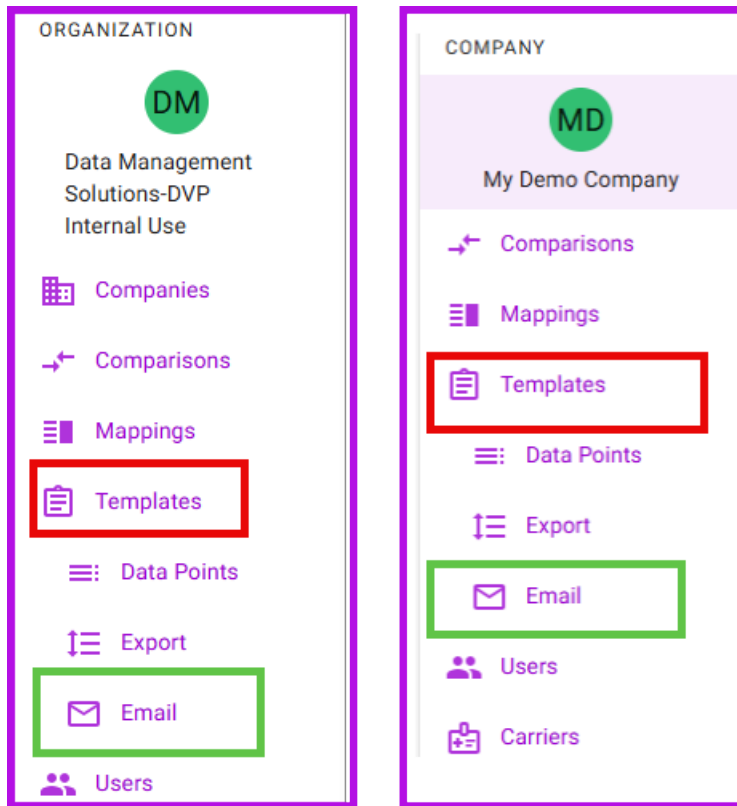
Click SAVE once customized.

Auditor Email

To customize the auditor email, click on the Template Library on either the Organization or Company Level and then EMAIL
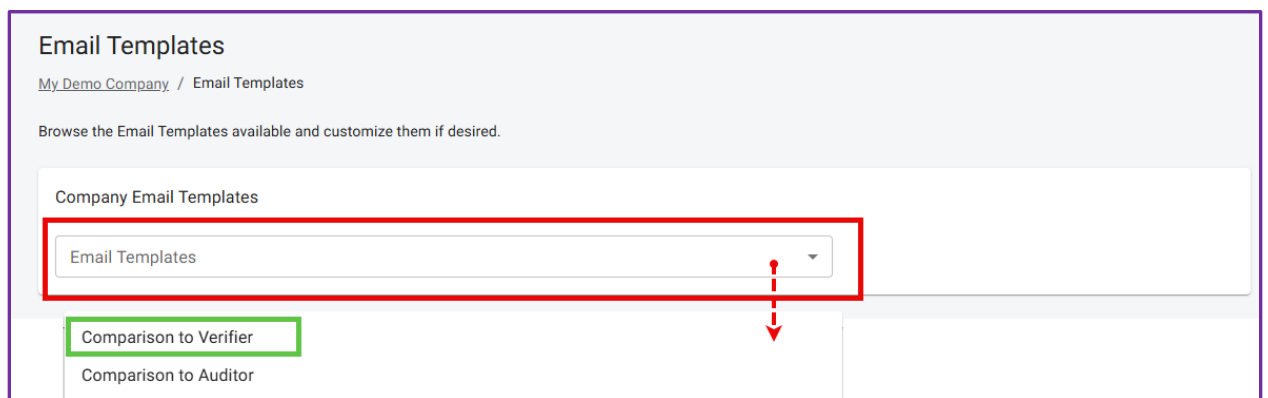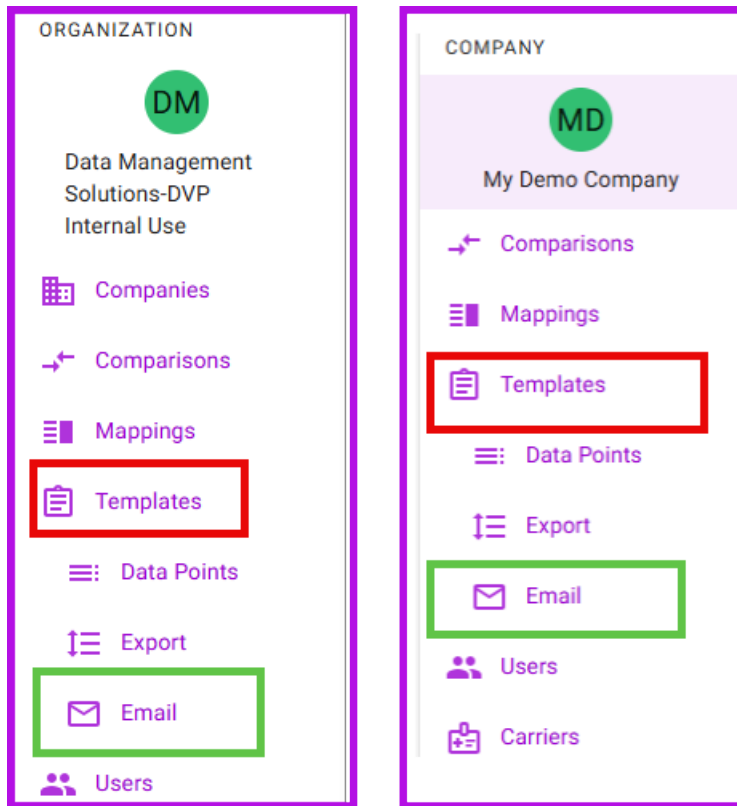
Select COMPARISION TO AUDITOR from the dropdown menu
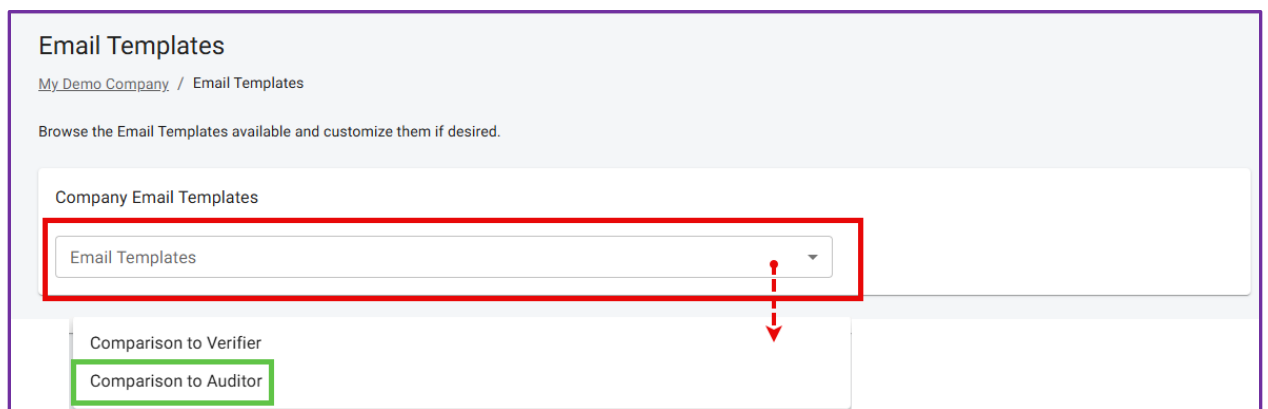
Click the edit icon (✎). Please note that if a trashcan icon (🗑) is available, there is current customization in place for this email.

Company Email Templates

Email Templates
Comparison to Auditor

This is a system default email template. Click the edit button above to customize it.

Email subject

Insert token

DMS - DVP: The verify discrepancies process has been completed for comparison: {{comparison_name}}

Email body

Paragraph | B *I* ⌗ | Insert token

Hello {{auditor_first_name}},
This is to inform you that the assigned verifier, {{verifier_first_name}} {{verifier_last_name}}, has finished verifying the discrepancies for your comparison: {{comparison_name}} for {{comparison_company_name}}.
{{comparison_direct_link_with_log_in_message}}
{{verifier_memo}}
Thank you,
on behalf of {{verifier_first_name}} {{verifier_last_name}}, {{verifier_company_name_or_organization_name}}

Company Email Templates

Email Templates
Comparison to Auditor

This is a custom email template. It was last updated on 12/3/2024 by: maryl. Click the edit button above to customize it, or click the delete button to restore the system default template.

Email subject

Insert token

DMS - DVP: The verify discrepancies process has been completed for comparison: {{comparison_name}}

Add customized language to the subject line as well as the body. Tokens are available as well and can be added to the email.

Click SAVE once customized.

Carrier Invoice Conversion

The Data Validation Platform has functionality to convert carrier invoices that are not platform-friendly and require significant manual adjustments before they can be used for auditing. This conversion functionality is available to all compare users but can only be converted on the company level.

What This Functionality Does:

1. Removes adjustments and blank rows to streamline data processing.
2. Expands member names into separate columns for First Name, Last Name, and Middle Initial (MI).
3. Totals costs where benefits have separate charges on separate rows for spouse and child, such as Critical Illness and Voluntary Life.
4. Adds additional total columns for benefits that are separated in one file but combined in another. This applies to Group Life and AD&D, as well as Voluntary Life and AD&D.

The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

To convert a carrier invoice:

1. Navigate to a company if organization user.
2. Under the company, select Convert Carrier Files in the left-hand menu.

COMPANY

AC

ABC Company

⇥ Comparisons

☰▌ Mappings

📋 Templates

👥 Users

🪪 Carriers

➡ Convert Carrier Files
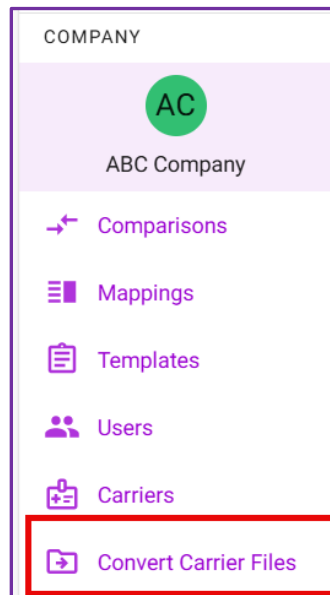
3. Select Carrier Format dropdown and then the applicable carrier file.

Convert a File

Carrier Format ▾

📄 Original Carrier File

Choose File No file chosen
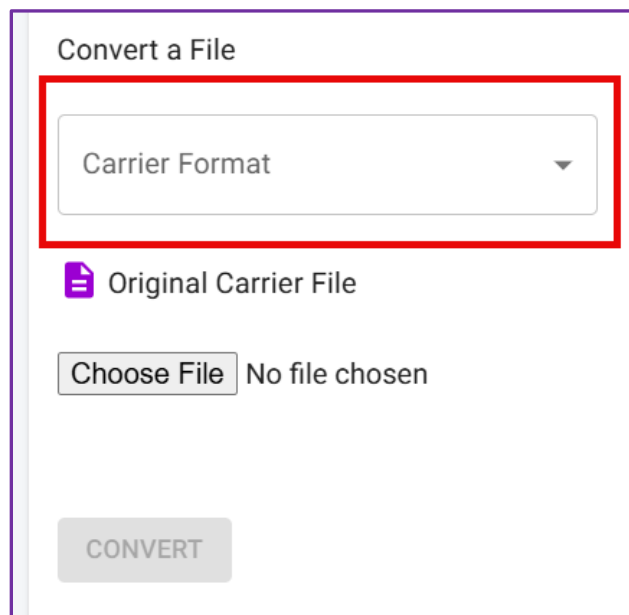
CONVERT

4. Click Choose File and select the carrier invoice

Data Management Solutions
Validate · Create · Convert

5. If multiple tabs, select the one to be converted and then rename if desired.

6. Click CONVERT. A successful message will show no conversion errors.

File converted and downloaded successfully! ✕

7. The converted file is automatically downloaded to the user's computer and is not saved in the Platform.

8. The file is not ready to be used in a comparison.

Carrier Tracking

 The Data Validation Platform provides the option to manually add carrier information for a company. The following information can be added into the Platform:

- Company Name (Required and must match company name in Platform)
- Carrier Name (Required and must match carrier name found in Import Template)
- Group Number
- Renewal Month (Required)
- Renewal Kickoff Days in Advance (Can choose between 30 to 90 days)
- Carrier Invoice Day of Month (Optional)
- Eligibility Management Type (Optional)
- Carrier Inception Date (Optional)
- Carrier End Date (Optional)
- Disable Renewals (Optional Checkbox)
- Carrier Contact Name (Optional)
- Carrier Contact Email (Optional)
- Carrier Contact Phone Number (Optional)
- Notes (Optional)
- Secondary Carrier Contact Name (Optional)
- Secondary Carrier Contact Email (Optional)
- Secondary Carrier Contact Phone Number (Optional)
- Audit Service (Optional Checkbox)
- Organization Eligibility Contact (Optional – select from available dropdown)
- Organization Audit Contact (Optional – select from available dropdown)

Carrier information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Manually Add Carrier

Carrier information can be added on the Company level by selecting Carriers from the left menu.
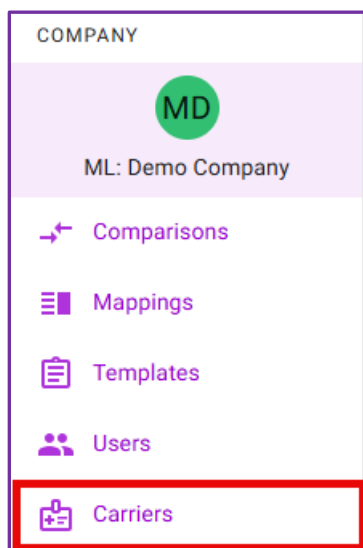
Click ADD A NEW CARRIER
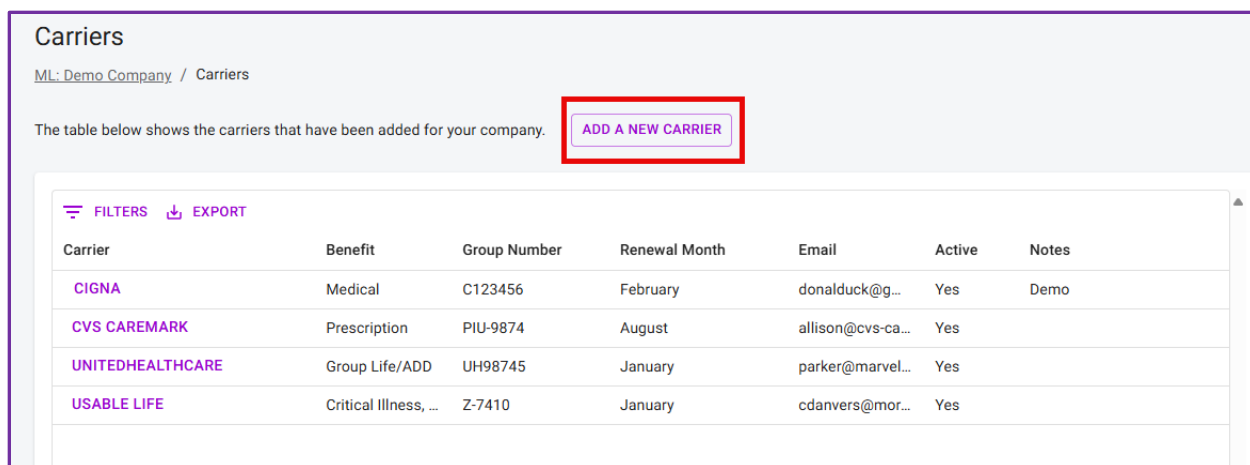
Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable.

- Carrier Name: The available carriers are provided. If a desired carrier is not listed, a request can be made to add through our enhancement request form: Enhancement Request Form - DMS Data Validate (dms-datavalidate.com)
- Renewal Month: Please select the company's annual benefit renewal month.

New Carrier

Carrier

Please contact us to add a carrier not in this list.

Group Number

Renewal Month

Renewal Kickoff Days In Advance

Carrier Invoice Day Of Month

Eligibility Management Type

Carrier Inception Date

Carrier End Date

Disable Renewals

☐ Disable Renewals

Carrier Contact Name

Carrier Contact Email

Carrier Contact Phone

Secondary Carrier Contact Name

Secondary Carrier Contact Email

Secondary Carrier Contact Phone

Audit Service

☐ Audit Service

Organization Eligibility Contact

Organization Audit Contact

Notes

SAVE

Click SAVE once all information has been added.

Once a carrier has been added to the company carrier library, it can then be selected during the audit creation process or updated at a later date.

Carrier Plan Tracking
▼

The Data Validation Platform provides the option to manually add carrier plan information for a company and a specific carrier. The following information can be added to the Platform:

- Carrier (Required and auto defaults to selected carrier)
- Plan Name (Required)
- Benefit Type (Required – select from available dropdown options)
- Group Number (Optional – If Group Number was added at Carrier Level, it will default to the Plan level. However, this field can be overwritten at the plan level)
- Eligibility Management Type (Optional – If Type was added at Carrier Level, it will default to the Plan level. However, this field can be overwritten at the plan level)
- Disable Renewals (Optional Checkbox)
- Notes (Optional)

Carrier plan information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

Manually Add Plan

Plan information can be manually added on the Company level by selecting Carriers from the left menu.

COMPANY

MD

ML: Demo Company

Comparisons

Mappings

Templates

Users

Carriers

Select the carrier that you would like to add a plan to. Please note that the carrier has to be added prior to adding a plan.

The table below shows the carriers that have been added for your company.   ADD A NEW CARRIER

FILTERS   EXPORT

Carrier	Group Number	Renewal Month	Eligibility Management Type	Active	Notes
CVS CAREMARK	PIU-9874	August		Yes	
CIGNA	C123456	February		Yes	Demo
UNITEDHEALTHCARE	UH98745	January		Yes	
ACCESS HEALTH	789541	January		Yes	No notes

Click ADD A NEW PLAN. The location of ADD A NEW PLAN will vary if there are existing plans under the carrier.

Carrier Information

EDIT

Carrier	**Group Number**
CVS Caremark	PIU-9874
Renewal Month	**Renewal Kickoff Days In Advance**
August	
Carrier Invoice Day Of Month	**Eligibility Management Type**
1	
Carrier Inception Date	**Carrier End Date**

Carrier Plans

Plan Name	Benefit	Eligibility Management Type	Inception Date	End Date	Disable Renewals	Active

No Plans Exist

ADD A NEW PLAN

Carrier Information

EDIT

Carrier	**Group Number**
UnitedHealthcare	UH98745
Renewal Month	**Renewal Kickoff Days In Advance**
January	
Carrier Invoice Day Of Month	**Eligibility Management Type**
15	
Carrier Inception Date	**Carrier End Date**

Carrier Plans

ADD A NEW PLAN

FILTERS   EXPORT

Plan Name	Benefit	Eligibility Management Type	Inception Date	End Date	Disable Renewals	Active
PLAN 1 GOLD	Medical				No	Yes

Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable. Click SAVE once all information has been added.

New Plan

Carrier

UnitedHealthcare

Plan Name

Benefit Type ▾

Group Number

Using Carrier Group Number: UH98745

Eligibility Management Type ▾

Plan Inception Date 📅

Plan End Date 📅

Disable Renewals

☐ Disable Renewals

Notes

SAVE

Template Library

The Data Management Solutions – Data Validation Platform template library contains three individual libraries:

1. Data Points templates
2. Export templates
3. Email templates

Both data points and export templates can be created and re-used during a compare. These two templates are created at the company level and are restricted to the specific company. To access the library, click on TEMPLATES under the company left side menu and then select the type of template.

PLEASE NOTE: Company admins which are available under our Platinum Elite subscription will only have access to the templates that are created under their specific company.

The data points and export templates are not editable other than the name. However, they can be deleted. Please be aware that a deleted template cannot be recovered, and the deletion is permanent. If deleted in error, the template will need to be recreated during the compare.

The email template library contains the default system generated emails for both the auditor and the verifier on both the organization and company levels. Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.

If customization is present the priority is

1. Company-Level Priority: If email templates are customized at both the organization and company levels, the company-level template will take precedence.
2. Fallback to Organization-Level: If no company customization is present, the Platform will use the organization-level customization.

3. Default System Emails: If no customization is made at either level, the Platform will default to the system-generated email.
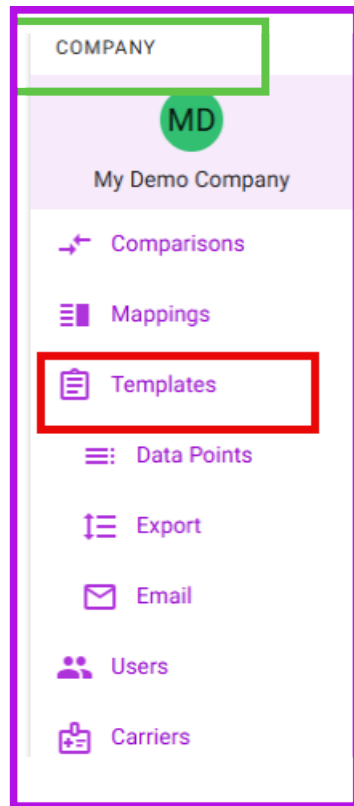
A shared data point or export template will also contain the user who created/last updated the template as well as which company the template originated from.

Data Points Templates

Data Management Solutions-DVP Internal Use / Data Points Templates / Demo Import Template

Browse the Data Points Templates available to all companies during comparisons.

Shared Data Point Templates

Data Points Template
Demo Import Template

Shared with Organization from Company: ML: Demo Company

Last updated on 3/26/2024 by: malanier2024

Baseline File	**Secondary File**	
Employee SSN	Employee SSN	☑ Unique Identifier
Social Security Number	Social Security Number	☑ Unique Identifier
First Name	First Name	☐ Unique Identifier
Middle Name	Middle Name	☐ Unique Identifier
Last Name	Last Name	☐ Unique Identifier
DOB	DOB	☐ Unique Identifier
Employment Status	Employment Status	☐ Unique Identifier

Reports

The Data Validation Platform provides several downloadable reports

Available on Step 5 Compare

- Discrepancy Report
- Original Baseline File- discrepancies only
- Original Secondary File – discrepancies only
- Original Baseline File
- Original Secondary File

Available on Step 8 Complete

- All Records Including Verified
- Verified Records Only

Discrepancy Report

This is a downloadable report located on Step 5 - Compare that contains all data discrepancies and missing data identified during the compare process. The report will include a results column along with the discrepancy function column IF this functionality was selected during the mapping process.

Original Baseline File – discrepancies only / Original Secondary File – discrepancies only

These are downloadable reports located on Step 5 – Compare. These reports display 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.

Original Baseline File / Original Secondary File

This is a downloadable report located on Step 5 - Compare that contains all data from the original import files prior to mapping and is available for either the baseline or the secondary.

All Records Including Verified

This is a downloadable report located in Step 8 - Complete that contains all records from either the baseline or secondary file including the verified records (discrepancies and missing). The *All Records Including Verified* report also includes 4 additional columns added to the original files:

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Ignored_Discrepancies

Verified Records only

This is a downloadable report located in Step 8 - Complete that contains **only** records from either the baseline or secondary file that have been verified (discrepancies and missing). The *Verified Records only* report also includes 3 additional columns added to the original files:

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes

Ignored Records will **<u>not</u>** show in the *Verified Records only* report.

Key Words

The Platform has key words that it utilizes to determine a match between columns. These key words are:

SSN:

- ssn
- social security number
- socialsecuritynumber
- ss#
- social security #
- ee id
- social security no
- memberid

First Name:

- first name
- firstname
- first_name
- fname

Last Name:

- last name
- lastname

Address:

- Address
- Address 1
- Address 2
- Address
- ADDRESS LINE 1
- ADDRESS LINE 2
- Street Address

Date of Hire:

- doh
- date of hire
- hire date

Date of Birth:

- dob
- date of birth
- birth date

Termination Date

- dot
- term date
- termination date

Zip

- Zip
- Zip code

Knowledge Base

The Data Validation Platform provides a knowledge base for frequently asked questions.

DV Platform Knowledge Base - DMS Data Validate (dms-datavalidate.com)

Benefit Systems

The Data Validation Platform provides instructional videos for various carrier files for enrollments and invoices.

DV Platform Benefit Systems - DMS Data Validate (dms-datavalidate.com)

Release Notes

The Data Validation Platform release notes are available through our website for reference.

Release Notes Log - DMS Data Validate (dms-datavalidate.com)

Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
Draft 1	06/01/2021	New document	Mary Lanier
1.0	06/01/2021	Approved document	Mary Lanier
2.0	06/23/2023	Updated instructions	Mary Lanier
3.0	04/04/2024	Updated instructions to include new color scheme, website, and enhancements.	Mary Lanier
4.0	05/24/2024	Updated verbiage to include masked social security number and how to assign a verifier. Also included notification emails to verifier and to auditor	Mary Lanier
5.0	07/09/2024	Updated to include carrier tracking enhancement	Mary Lanier
6.0	10/15/2024	Added verbiage to include discrepancy type dropdown and additional field to the carrier tracking information	Mary Lanier
7.0	12/05/2024	Updated with new enhancements including additional discrepancy reports and customized emails	Mary Lanier
8.0	02/19/2025	Updated with new enhancement for Carrier Invoice Conversion	Mary Lanier
9.0	05/20/2025	Updated with new carrier plan feature and additional user fields	Mary Lanier
10.0	06/12/2025	Updated carrier and plan fields	Mary Lanier