

## Release Update – June 10

Broker Builder Solutions/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

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#### Applicable users: ALL Users

##### New Benefit Types and Naming Aliases Now Supported

We've expanded the list of available Benefit Types when adding a plan to include:

- Employee Assistance Program
- Parking
- Transit

In addition, the Platform now recognizes and accepts common industry naming aliases for benefit types during the import, including:

1. EAP for *Employee Assistance Program*
2. Health Savings Account for *HSA*
3. Health Retirement Account for *HRA*
4. Group STD for *Group Short Term Disability*
5. Vol STD for *Voluntary Short Term Disability*
6. Group LTD for *Group Long Term Disability*
7. Vol LTD for *Voluntary Long Term Disability*
8. DCA for *Dependent Care FSA*

These updates reduce input errors by supporting widely used benefit terminology across the industry.

##### New Carriers Added to the Platform

We've added two additional carrier options to the Platform to provide greater flexibility when managing plans:

1. Employer Sponsored
2. Other

These new carrier types help capture a broader range of benefit offerings and administrative scenarios.

##### Group Number No Longer Required for Carriers and Plans

We've updated the Platform to remove the required status on the Group Number field at both the carrier and plan levels. This change applies to both the import function as well as manual entry.

This change provides greater flexibility when entering carrier and plan data, especially in cases where a group number may not be applicable or available during setup.

#### **Carrier Plan Inception and End Dates Removed**

We've removed the **Inception Date** and **End Date** fields from the **carrier plan level**. These date fields will now be managed exclusively at the **carrier level**.

This change helps streamline data entry and ensures consistency in plan timelines.

### **Applicable users: Organization Users**

#### **New User Role Added – Organization Task Manager**

We're excited to introduce a new user role in the Platform: Organization Task Manager.

This role is similar to the Organization Comparer (Whitelisted), with one key difference—it does not have the ability to create audits. The Organization Task Manager role was created in preparation for our upcoming Agency Task Module and offers the following capabilities:

- Can be assigned as a Company Organization Contact
- Can access and modify carriers and carrier plans available to them
- Retains verification functionality

Importantly, this role does not count against an organization's seat limit, allowing for unlimited Organization Task Manager users.

#### **Enhanced Import Functionality Now Available**

We're pleased to announce several enhancements to the Platform's import functionality, designed to streamline data entry and reduce user confusion.

##### **Improved User Access Clarity**

- For users without import permissions, the **Import button is now grayed out**. Previously, users could click the button and receive an error message—this update improves the experience by clearly indicating inaccessibility upfront.

##### **New Company Import Template**

The company import process has been expanded from a single-column Excel file to a more comprehensive template that now includes the following fields:

1. Company Name (*Required*)
2. Notes

3. First Demo Date
4. Activation Date
5. Primary Organization Contact Username
6. Secondary Organization Contact Username
7. Renewal Contact Username
8. Organization Benefit Admin System

*Note: The selected system must already exist at the Organization level prior to import.*

#### Updated Carrier Import Template

- Now includes **reference tabs** to help ensure correct naming conventions for **Carriers** and **Eligibility Management Types**.
- The **Group Number** field is **no longer required**, both for imports and manual entries.

#### New Carrier Plan Import Template

A new Carrier Plan import template has been introduced, supporting the following fields:

1. Company Name *(Required)*
2. Carrier Name *(Required)*
3. Plan Name *(Required)*
4. Benefit Type *(Required)*
5. Group Number
6. Eligibility Management Type
7. Disable Renewals
8. Notes

Reference tabs for **Carriers** and **Benefit Types** are also included in this template to help ensure consistency and prevent naming errors during the import process.

These enhancements are designed to simplify setup, increase accuracy, and offer greater flexibility in managing your data within the Platform.



#### **Reminder: Carrier and Carrier Plan Features Availability**

Please note that Carriers and Carrier Plans are only available to organizations on the Platinum Elite and Subscription-Based Plans.

If you're interested in upgrading your current subscription, please contact our Business Development Team at [sales@dms-datavalidate.com](mailto:sales@dms-datavalidate.com) or complete the online form here:

[\*\*DVP Platinum Elite Subscription Form - DMS Data Validate\*\*](#)

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