Release Update – *August 21*

Broker Builder Solutions/Data Management Solutions is pleased to announce this week's enhancements and fixes to our application. 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

New Benefit Types

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

- Term Life
- Whole Life
- Pharmacy/Rx

New Carriers Added

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

1. HealthEZ
2. Curative
3. French International Benefit
4. Naviline
5. Flex Facts
6. Nation Wide
7. American Fidelity Assurance
8. Prairie States Enterprises Inc.

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

Applicable users: Organization Users

New Agency Task Module – Phase 1 Launch: Renewal Wizard

We're excited to announce that Phase 1 of the New Agency Task Module is now live!

This first release is focused solely on Group Renewals and introduces a shared workspace where a General Agent (GA) can start a group's renewal and collaborate with designated Organization contact(s) to complete the renewal information checklist—covering items such as Open Enrollment dates and plan details.

How It Works

1. Initiating the Renewal
    - The GA Renewal Contact (found on the Company Detail page) creates a Renewal Task in the Data Management Solutions application.
    - Renewals are managed at the company level and only include active plans for the company's specific renewal month.

      Example: An October 2025 renewal will include only active plans with an October renewal date (as listed in each Carrier entry).
    - Once created, the system sends an automated email to the designated Primary and Secondary Organization contact(s) (found on the Company Detail page) to notify them that a renewal has been assigned.
2. Broker Managed Option (Step 1 – Client Information)
    - The Organization may choose to mark the renewal as Broker Managed, allowing them to take the lead instead of the GA.
    - An additional Broker Managed Contact can also be added.
3. Completing Renewal Information and Plans Checklist (Steps 1 & 2)
    - Organization contact(s) log in to enter the Client Information and complete the Plans Checklist.
    - After each step is submitted, the GA Renewal Contact receives an automated notification to review, request changes, or approve.
4. Demo Environment Setup
    - Once both Client Information and Plans Checklist are approved, the wizard advances to Demo Setup.
    - The GA Renewal Contact adds details needed for testing such as demo users.
    - The system sends the Organization contact(s) a notification when the demo environment is ready for testing.
5. Go Live Preparation
    - After thorough testing, Organization/Broker contact(s) must check all acknowledgement boxes before the Go Live button appears.
    - This confirms the system has been fully tested and is ready for employees on the dates provided in Client Information.

- Triggering GO LIVE sends a notification to the GA Renewal Contact.

6. Finalization
   - Once the renewal is complete in the Benefit Administration system, the GA Renewal Contact closes the Renewal Task, and the system sends an automated closeout email.
7. Post Go Live Changes
   - If changes are needed after Go Live, previous steps cannot be reopened.
   - Comments can be added and impacted plans selected to document changes.

Communication:

At every step, automated emails, including the last posted comment, keep both the GA and Organization contacts informed - requesting updates, clarifying information, confirming approvals, or marking completion. This eliminates long email chains and ensures clear, transparent communication for all parties throughout the process.

Reminder: Carrier, Carrier Plans, and new Agency Task Module Availability

Please note that Carriers and Carrier Plans as well as the Agency Task Module 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 or complete the online form here:

DVP Platinum Elite Subscription Form - DMS Data Validate