Release Update – *September 23*

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:

1. Identity Protection
2. Linked Marketplace
3. Universal
4. Private Insurance Account
5. Transit Reimbursement
6. Medical Underwriting
7. Roth 401k
8. Wellness
9. Disability
10. Group Dependent Life
11. Legal
12. Perk
13. Pet Insurance

New Carriers Added

We've added additional carrier options to the Data Management Solutions application to provide greater flexibility when managing plans:

AmeriBen	Health Net of CA	Pet Plan Benefit
All One Health	Healthgram	PS Administrators
Angle Health	HRC Total Solutions	Sentinel Benefits
ARAG	HSA Bank	Sharp Healthcare
ASPCA	Inspira Financial	SIMNSA
Assurity Life Insurance Company	Kaiser-SO CA	Surest
Behavioral Healthcare Options	LegalEASE	Transamerica
Bend Financial	LegalShield	UMB Bank
Cal Choice	LifeLock	Unicare
Circle Health	London Health Administrators	United Concordia
Covered California	Mass General Brigham	United Pet Care
Delta Vision	MediExcel	Virgin Pulse

Dental Health Services	NY Life	Wealthcare
EBA&M	Pacific Life	Wishbone Pet Insurance
Health Net	Pet Benefit Solutions	XP Health

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

New Eligibility Management Types

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

1. BBS (O) Managed Carrier Key
2. BBS (O) Managed EDI
3. BBS (O) Managed DEX
4. BBS (O) Managed Proprietary

Additional Discrepancy Types Added

We've expanded the list of discrepancy types available in the dropdown within Verify Discrepancies and Verify Missing Steps in the Audit Wizard. These new options provide more precise categorization of issues and allow for a clearer view of discrepancy reasons alongside auditor notes.

New discrepancy types include:

1. Wrong Plan
2. Name Mismatch
3. DOB Mismatch
4. Timing Issue
5. Term
6. COBRA
7. Dropped Coverage at OE
8. EOI Pending
9. Gender Mismatch

Applicable users: Organization Users

Increased Maximum Carrier File Import Limit

We've increased the maximum number of records that can be imported in a Carrier file from 400 to 800. This enhancement reduces the number of import actions needed when working with a large number of carriers, saving you time and effort.

Enhanced Renewal Kickoff Email

We've improved the language in the renewal kickoff email sent to applicable organization users and the GA Renewal contact. The updated email now clearly outlines expectations, including when client
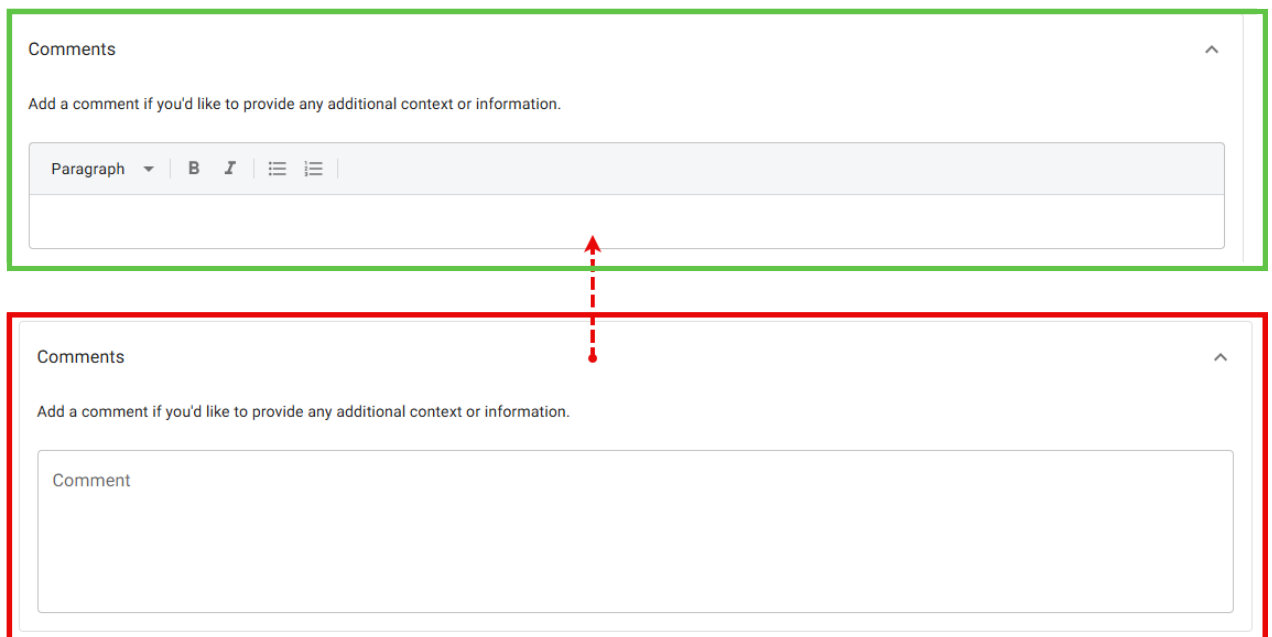
information and the plans checklist are due, along with the timeline for the internal QA process. This enhancement ensures all parties have a clear understanding of requirements and next steps.

Enhanced Comment Section in the Renewal Wizard

We've upgraded the comment sections in each step of the Renewal Wizard from a plain text editor to a rich text editor, allowing users to format their comments. In addition, the character limit has been increased from **1,000 to 8,000** characters to support more detailed input.

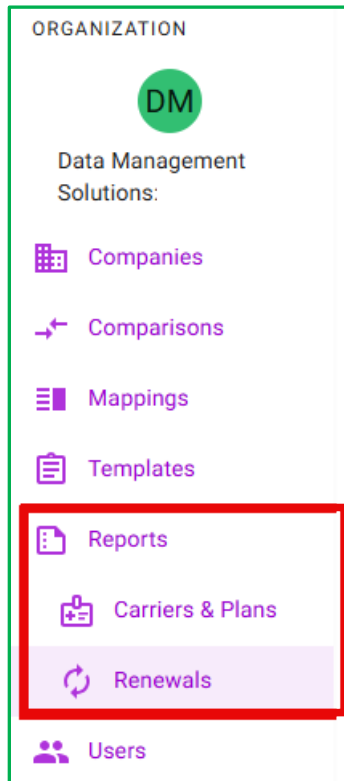*Please note formatting counts toward the character limit.*

This enhancement gives a user greater flexibility in documenting renewal details and to accommodate extended comments where needed.

New Reporting Section

We've added a new **Reports** section at the Organization level. This section provides visibility into carriers, plans, and company renewals—all in one central location. Reports can be filtered by various columns and exported to CSV or printed, eliminating the need to navigate to each company or renewal individually.

Ability to Update Carrier

You can now update a carrier if one was selected in error. If the carrier is linked to a renewal, the renewal will automatically update as well. This enhancement lets you correct mistakes without needing to add a new entry and makes it easy to update to the correct carrier if Other was originally chosen.
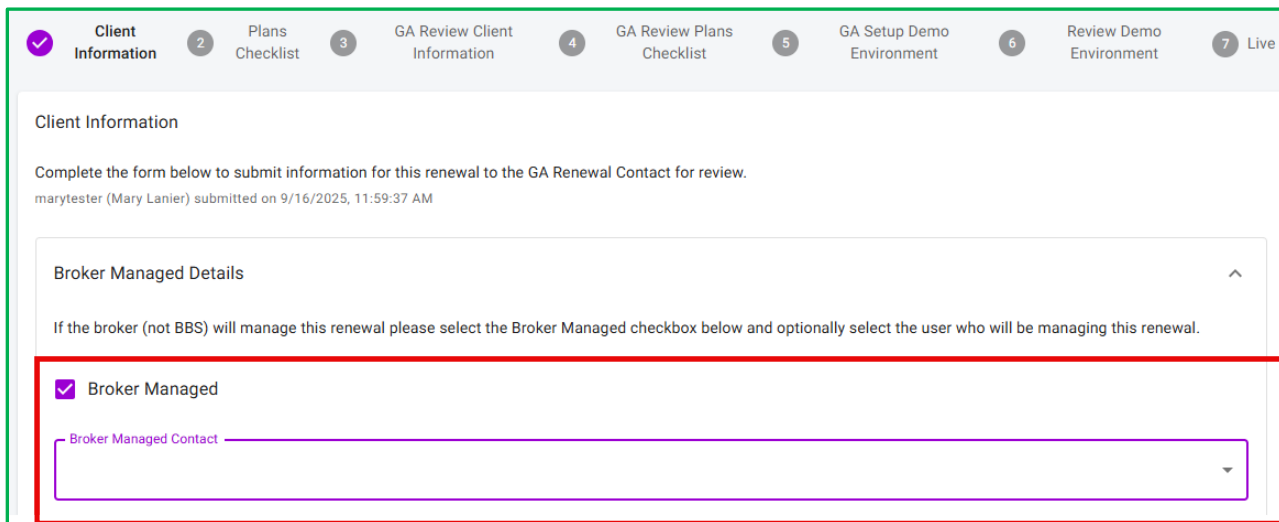
Please note best practice is to create a new entry for a carrier and end the prior carrier if the carrier is being dropped and replaced at Renewal.

Fixes

Applicable users: *Organization Users*

Primary and Secondary Contacts added to the Broker Managed Dropdown in the Renewal Wizard

We have corrected the issue where the assigned primary and secondary contacts in the Renewal Wizard were not visible in the dropdown list when Broker Managed is selected in the Renewal Wizard under the Client Information step.

GA Setup Demo Environment – Restricted Access

We've fixed an issue where **Demo Environment Notes** and the **Submit Demo Environment Information** button were incorrectly functional to Organization Users. These options are intended only for the GA Renewal Contact. Organization Users can instead provide comments in the next step, **Review Demo Environment**, along with the Acknowledgement questions.

🔔 **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@brokerbuildersolutions.com or complete the online form here:

DVP Platinum Elite Subscription Form - DMS Data Validate