



Data Management Solutions

Validate ▪ Create ▪ Convert

Organization User Guide

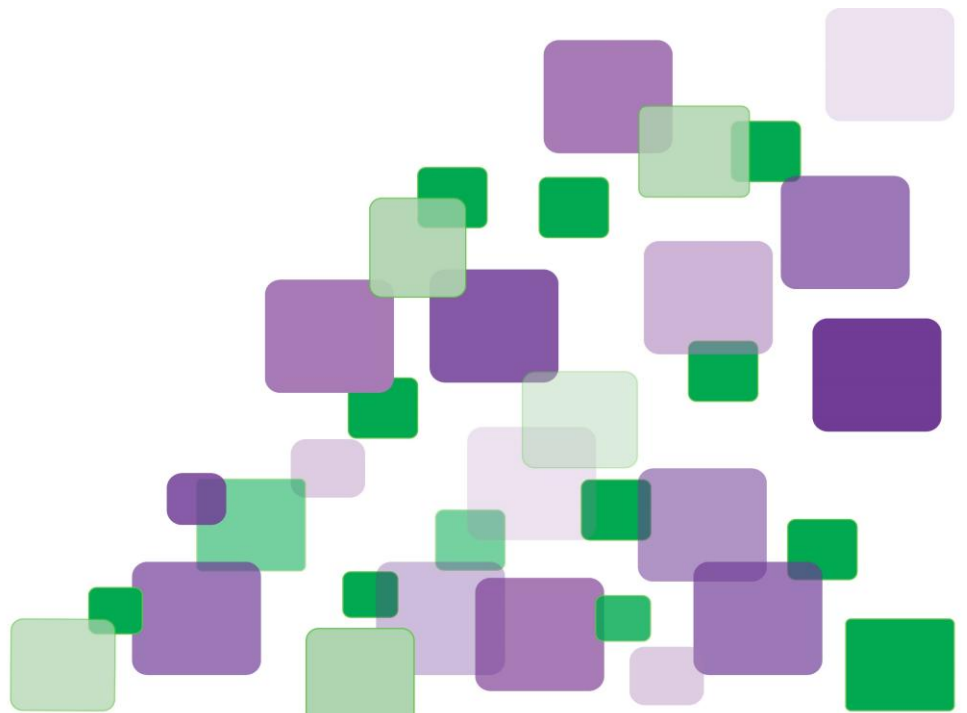




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Login

The Data Management Solutions application 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 an update during the registration process.

The screenshot shows the Data Management Solutions website header with the logo and navigation menu. The 'Login' button is highlighted with a red box. An arrow points from the 'Login' button to a login form titled 'Sign in to your account'. The form includes fields for 'Username or email address *' and 'Password *', a 'Sign in' button, and a 'Forgot your password?' link.

Registration Email Example:

The screenshot shows an email from notifications@dms-datavalidate.com via amazonses.com. The email body contains the following text:

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.

The email also includes 'Reply' and 'Forward' buttons.



Users

The Data Management Solutions application supports six (7) user types, each with varying levels of access and functionality:

1. **Agency User – Full Access**
Has full access to multiple organizations and all features within the application, including the ability to add or deactivate users at both the organization and company levels.
2. **Organization Admin – Full Access**
Provides complete access to all features within the application, including the ability to add and deactivate users.
3. **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.
4. **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.
5. **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.
6. **Company-Level 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.
7. **Company-Level 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.



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

Adding an Organization Admin user

Select USERS under the desired organization.

The screenshot shows the Data Management Solutions dashboard. On the left sidebar, under the 'ORGANIZATION' section, the 'Users' option is highlighted with a red box. The main content area displays the 'Information' section for the organization 'Data Management Solutions', showing various statistics and a 'VIEW' button.

Organization Name	Users Count
Data Management Solutions	8

Total Companies Count	Active Companies Count
27	18

Inactive Companies Count	Active
9	Yes

Plan	Admin & Comparer Seats
Platinum Elite	10

Select ADD A NEW ORGANIZATION USER.

The screenshot shows the 'Users' page in the Data Management Solutions dashboard. The left sidebar is the same as the previous screenshot. The main content area is titled 'Users' and shows a table of users. A red box highlights the 'ADD A NEW ORGANIZATION USER' button in the top right corner.

Username	First Name	Last Name	Role
----------	------------	-----------	------



Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user. **Please note that the email address and username CAN NOT be changed once saved.**

Add New Organization User

[Data Management Solutions](#) / [Users](#) / Add New Organization User

Complete the form below to add a new Organization User to the system.

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level

Organization Admin ▾

Organization

Data Management Solutions

Role

☒ ORGANIZATION_ADMIN

SAVE



Data Management Solutions

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In the Access Level dropdown, select the user type: Organization Admin. This access level has full site functionality including adding and inactivating users.

Once all applicable information has been entered click Save. Whitelisted functionality is not available as the user has admin access.

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

Adding an Organization Comparer user

Select USERS under the desired organization.

The screenshot displays the Data Management Solutions web application. On the left, a sidebar under the 'ORGANIZATION' header lists various menu items: Companies, Comparisons, Mappings, Templates, Reports, and Users. The 'Users' item, which includes a user icon, is highlighted with a red rectangular box. Below this list is a 'COMPANY' section with a question mark icon and a 'Select a Company' button. The main content area on the right is titled 'Data Management Solutions' and shows a welcome message for 'malanier2024!'. It contains an 'Information' section with a 'VIEW' button and a table of organizational statistics.

Information	
Organization Name Data Management Solutions	Users Count 8
Total Companies Count 27	Active Companies Count 18
Inactive Companies Count 9	Active Yes
Plan Platinum Elite	Admin & Comparer Seats 10
Notes	

Select ADD A NEW ORGANIZATION USER.



Data Management Solutions

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ORGANIZATION

DM

Data Management Solutions

Companies

Comparisons

Mappings

Templates

Reports

Users

Users

Data Management Solutions / Users

The table below shows all of your organization's users currently in the system.

FILTERS

Username	First Name	Last Name	Role
----------	------------	-----------	------

ADD A NEW ORGANIZATION USER

Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user. **Please note that the email address and username CAN NOT be changed once saved.**



New User

Billing Contact

☐ Billing Contact

Access Level

Organization Compare Access ▾

Organization

Data Management Solutions

Role

☒ ORGANIZATION_COMPARER

SAVE

Whitelisted Companies

Select the companies that this user should have access to.

[SELECT ALL](#) [REMOVE ALL](#)

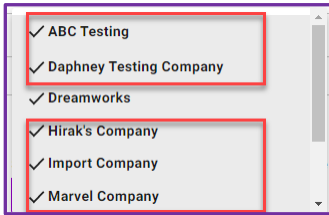
In the Access Level dropdown, select the user type: Organization Compare Access. Organization Compare Access level has limited functionality. This level has full compare and merge functionality but only for whitelisted companies.

By default, this user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.



Data Management Solutions

Validate ■ Create ■ Convert

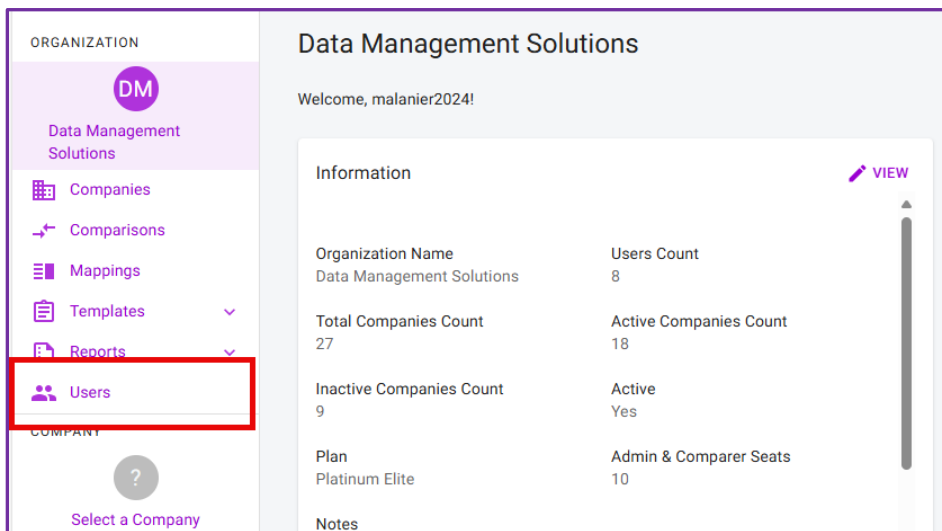


Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

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

Adding an Organization Task Manager user

Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.



Data Management Solutions

Validate ■ Create ■ Convert

ORGANIZATION

DM

Data Management Solutions

Companies

Comparisons

Mappings

Templates

Reports

Users

Users

Data Management Solutions / Users

The table below shows all of your organization's users currently in the system.

FILTERS

Username	First Name	Last Name	Role
----------	------------	-----------	------

ADD A NEW ORGANIZATION USER

Enter all applicable information (Email, Username, First Name, Last Name, Phone, Job Title) for the newly created user. **Please note that the email address and username CAN NOT be changed once saved.**



Add New Organization User

[Data Management Solutions](#) / [Users](#) / Add New Organization User

Complete the form below to add a new Organization User to the system.

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level

Organization Task Manager ▼

Organization

Data Management Solutions

Role

☒ ORGANIZATION_TASK_MANAGER

SAVE

Whitelisted Companies

Select the companies that this user should have access to.

A Touch of Pink Bakery, ABC Company, ... ▼

[SELECT ALL](#) [REMOVE ALL](#)

In the Access Level dropdown, select the user type: Organization Task Manager. Organization Task Manager level has limited functionality. This level grants the same permissions as the Organization Comparer, excluding compare and merge functionality.

By default, this user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.



Data Management Solutions

Validate ■ Create ■ Convert



Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

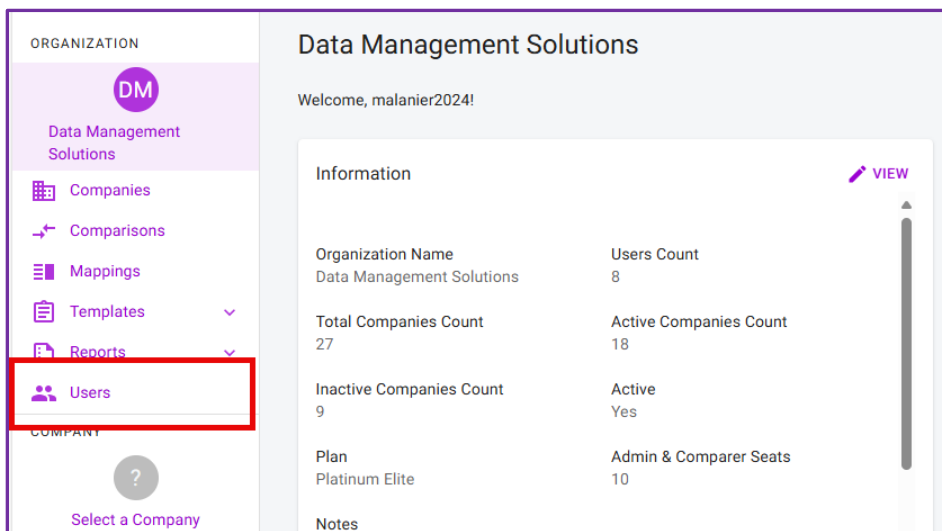
The user will then receive an auto-generated email with a temporary password and a link to register their account.



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

Adding an Organization Verifier user

Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.



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ORGANIZATION

DM

Data Management Solutions

Companies

Comparisons

Mappings

Templates

Reports

Users

Users

Data Management Solutions / Users

The table below shows all of your organization's users currently in the system.

1 FILTERS

Username	First Name	Last Name	Role
----------	------------	-----------	------

ADD A NEW ORGANIZATION USER

Enter all applicable information for the newly created user and check the VERIFIER ACCESS ONLY box.



Add New Organization User

[Data Management Solutions](#) / [Users](#) / Add New Organization User

Complete the form below to add a new Organization User to the system.

New User

Billing Contact

☐ Billing Contact

Access Level

Organization Verifier Access Only ▾

Whitelisted Companies

Select the companies that this user should have access to.

A Touch of Pink Bakery, ABC Company, ... ▾

[SELECT ALL](#) [REMOVE ALL](#)

Organization

Data Management Solutions

Role

☒ ORGANIZATION_USER

[SAVE](#)

In the Access Level dropdown, select the user type: Organization Verifier Access Only. Organization Verifier Access level has partial functionality. This level is limited to verifying discrepancies and missing data for existing compares only. No compare and merge functionality exists for this level.

By default, a Verifier user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.



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Validate ■ Create ■ Convert



Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

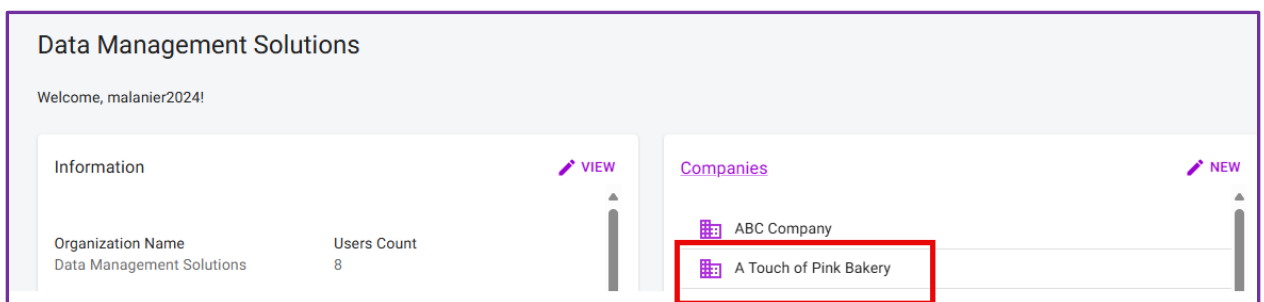
The user will then receive an auto-generated email with a temporary password and a link to register their account.



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

Adding a Company Admin user

Select the Company where the new user will be added.

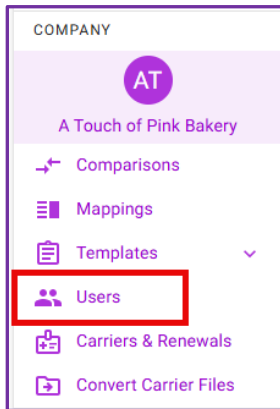


Click USERS under the desired company.

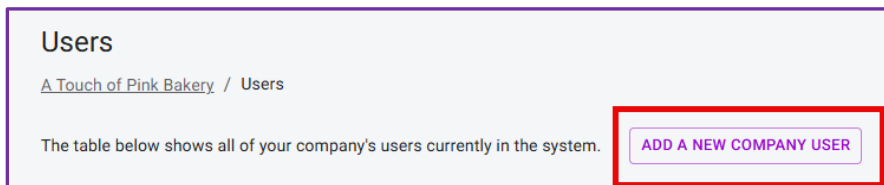


Data Management Solutions

Validate ■ Create ■ Convert



Click ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user.



New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level

Company Admin ▾

Company

A Touch of Pink Bakery

Role

☒ COMPANY_ADMIN

SAVE

In the Access Level dropdown, select the user type: Company Admin. This access level has full compare and merge functionality for the specific company that the user was created under.

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.



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Validate ■ Create ■ Convert

Adding a Company Verifier user

Select the Company where the new user will be added.

Data Management Solutions

Welcome, malanier2024!

Information

Organization Name

Data Management Solutions

Users Count

8

VIEW

Companies

ABC Company

A Touch of Pink Bakery

NEW

Click USERS under the desired company.

COMPANY

AT

A Touch of Pink Bakery

Comparisons

Mappings

Templates

Users

Carriers & Renewals

Convert Carrier Files

Click ADD A NEW COMPANY USER.

Users

[A Touch of Pink Bakery](#) / Users

The table below shows all of your company's users currently in the system.

ADD A NEW COMPANY USER

Enter all applicable information for the newly created user.



Data Management Solutions

Validate ■ Create ■ Convert

New User

Email Address

Username

First Name

Last Name

Phone

Job Title

Billing Contact

☐ Billing Contact

Access Level

Company Verifier Access Only ▾

Company

A Touch of Pink Bakery

Role

☒ COMPANY_USER

SAVE

Once all applicable information has been entered click Save. Whitelisted functionality is not available as the user is limited to the company they were created under.

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



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



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Inactivating / Reactivating a User

Select USERS under the organization.

ORGANIZATION

DM
Data Management Solutions

- Companies
- Comparisons
- Mappings
- Templates
- Reports
- Users**

Data Management Solutions

Welcome, malanier2024!

Information [VIEW](#)

Organization Name	Users Count
Data Management Solutions	8
Total Companies Count	Active Companies Count
27	18
Inactive Companies Count	Active
9	Yes
Plan	Admin & Comparer Seats
Platinum Elite	10

Notes

Select User to inactivate.

Users

[Data Management Solutions](#) / [Users](#)

The table below shows all of your organization's users currently in the system. [ADD A NEW ORGANIZATION USER](#)

FILTERS

Username ↓	First Name	Last Name	Role	Enabled
MALANIER2024	Mary	Lanier	Organization Admin	Yes
DUMMY5	Five	Dummy	Organization Admin	Yes

Click DISABLE in the user account. The button will change to ENABLE

User Information [EDIT](#)

Username: demobroker1 Email: datamanagementsolutionsdvp@gmail.com

This user is currently **enabled**.

DISABLE



Data Management Solutions

Validate ■ Create ■ Convert

To reverse the inactivation, click ENABLE.

User Information		EDIT
Username	Email	
demobroker1	datamanagementsolutionsdvp@gmail.com	ENABLE



Create the Compare Only

The compare process involves multiple steps, beginning with naming the compare and continuing through to its completion. Each step must be completed in sequence to move forward. Steps beyond **Step 5 – Compare** are optional and can be skipped if not applicable. With the exception of the initial compare creation, previously completed steps can be revisited and reset if needed.

Select the Company

Select a Company or click NEW to create a new company.

Data Management Solutions-DVP Internal Use

Welcome, malanier2024!

Information EDIT

Organization Name Data Management Solutions-DVP Internal Use	Users Count 2
Total Companies Count 2	Active Companies Count 2
Inactive Companies Count 0	Active Yes
Plan DVP Base 3-6	Admin & Comparer Seats 3

Companies

- DD DS: Demo Company
- MD ML: Demo Company

NEW

Create New Compare

Select NEW to begin a new comparison

ML: Demo Company

Welcome, malanier2024!

Information EDIT

Company Name ML: Demo Company	Organization Name Data Management Solutions-DVP Internal Use
----------------------------------	---

Comparisons

test Complete

NEW



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.

New Comparison

Name

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type

Compare Only

SAVE

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.



Data Management Solutions

Validate ■ Create ■ Convert

Import Data

Select the files to be used for comparison.

Baseline File

Choose File

Test Files for ...03.07.2024.xlsx

Select Worksheet

baseline

Baseline File Name

Base

.xlsx

BACK

SAVE

Secondary File

Choose File

Test Files for ...03.07.2024.xlsx

USE BASELINE FILE

Select Worksheet

secondary

Secondary File Name

Secondary

.xlsx

Select Data Points & Create Import Template

Matching data points will be auto populated, and you may add or remove data points as needed. At least **one (1) unique identifier** must be selected. To remove all data points, click **CLEAR ALL**.

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

Note: When using a masked SSN, it is strongly recommended to include additional unique identifiers (UIs) such as first name, last name, date of birth, or relationship (if applicable) to ensure the most accurate results.

Optionally, check **SHARE WITH ORGANIZATION** to add the template to your Organization-Level Template Library. Templates shared by an Organization Admin or Organization Compare User can be accessed across all companies within the same organization.

Company Admins (available under the **Platinum Elite** subscription) will only have access to templates created within their specific company.

Once all desired data points and unique identifiers have been selected, you can save the configuration for future use by entering a **Template Name** and clicking **SAVE**.



Data Management Solutions

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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 ▼

Base.xlsx baseline	Secondary.xlsx secondary		
Social Security Number	Social Security Number	☒ Unique Identifier	×
Employee SSN	Employee SSN	☒ 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](#)

[CLEAR ALL](#)

Select Data Points & Reuse Existing Template

Select a relevant data points template from the dropdown menu. Templates will only appear if the data points align with the column names in the import file.



Data Management Solutions

Validate ■ Create ■ Convert

If no template is available, you can create one by selecting the desired data points and unique identifier(s), then entering a template name. Once saved, the template will be added to your library for future use and can optionally be shared with the organization for use across other companies.

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		
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



Data Management Solutions

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NOTE: When using a saved template, any changes made during the audit—such as adding or removing data points—are temporary and will not modify the existing template.

To preserve changes, create a new template by entering a new template name and clicking SAVE.

For example, in the scenario below, the auditor used the Demo Import Template but removed the DOB data point. This modification is temporary and does not affect the original template. By saving with a new template name, a separate version is created without the DOB data point.

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		
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	×
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
Demo Import Template with NO DOB

☒ Share with Organization

BACKSAVE



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 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.

Employment Status - Employment Status X

Select Mappings or NEW MAPPINGS

Data Mappings name
Employment Status

Source Value	Target Value
Source: A	Target: Active X
Source: T	Target: Terminated X
Source: L	Target: Leave of Absence X

+ ADD MAPPING

SAVE MAPPINGS

If you use existing mapping, click SELECT MAPPINGS.



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Employment Status Employment Status MAP NONE

Employment Status - Employment Status X

Select Mappings Employment Status or NEW MAPPINGS

Source Value Source A Source L Source T

Target Value Target Active Target Leave of Absence Target Terminated

SELECT MAPPINGS

VIEW IN MAPPINGS LIBRARY

Employment Status Employment Status EMPLOYMENT STATUS NONE

BACK NEXT

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.

Data Points

'Base'	'Secondary'	Data Mappings	Date Format	Computation Function
DOB	DOB	MAP	none	DOB - DOB
Employment Status	Employment Status	EMPLOYMENT STATUS	NONE	

If one of the file's cells are not formatted as a "Date" in Excel, select the format below and the system will attempt to convert it to a date during the comparison. For unsupported date formats, you may need to re-import your file after converting the cells to a date format.

Format MM/dd/yyyy

SAVE DATE FORMAT



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.



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Data Mappings name
Deduction Code

Source Value	Target Value
Source STD	Target STD 14 day
Source STD	Target STD 30 day

Data Mappings name
Deduction Code

Source Value	Target Value
Source STD 14 day	Target STD
Source STD 30 day	Target STD

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.

Computation Function

NONE

NONE

NONE

If both files contain a numeric value, and there is a discrepancy between the two values, the system will attempt to run the selected computation function on the values. If successful, the resulting discrepancy computation value will be included on the the Discrepancy Reports.

Format

NONE

MINUS: BASELINE - SECONDARY

MINUS: SECONDARY - BASELINE

ADD

MULTIPLY

DIVIDE: BASELINE / SECONDARY

DIVIDE: SECONDARY / BASELINE

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.



Data Management Solutions

Validate ■ Create ■ Convert

Comparison Details

Discrepancy Counts by Data Point

'Base'	'Secondary'	Computation Function	Count
First Name	First Name		1
Employment Status	Employment Status		1
Monthly Premium	Monthly Premium	minus: baseline - secondary	4

Missing Counts

No missing records found!

Discrepancy Report

First name	Last name	Relationship	Unique Identifier	'Base' row / data point	'Secondary' row / data point	'Base' value	'Secondary' value	Computation Function Result
Katherine	Aldridge		217219160_****9160	4 / Monthly Premium	4 / Monthly Premium	654.98	259.55	395.43



Note: This functionality applies **only to numeric fields**, and **only to data points that are *not* part of the unique identifier**.

Only results from the **subtraction (minus)** function will proceed through the full compare process. All other functions will stop 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.](#)



Data Management Solutions

Validate ■ Create ■ Convert

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.



Data Management Solutions

Validate ■ Create ■ Convert

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.



Data Management Solutions

Validate ■ Create ■ Convert

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	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	☐ 654.98 ☐ 259.55 ☐ Overwrite ☐ Ignore	-	Discrepancy Type 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 (^)



Data Management Solutions

Validate ■ Create ■ Convert

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	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	654.98 259.55 Overwrite Ignore	--	Discrepancy Type Auditor notes Verifier notes	

KatherineAldridge4 / Monthly Premium4 / Monthly PremiumIgnore

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.

Rows per page: 5 1-2 of 2 < >

Verifier Memo

BACKNEXTOVERWRITE AS COMPLETE

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.



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.

Verify Discrepancies

Verify the missing discrepancies below by selecting whether or not the missing records should be included or excluded in the verified output files. 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	Unique Identifier	'base' row	'second' row	Duplicate unique identifier row	Verified Inclusion	Last Verified By	Discrepancy Type / Notes
Julia	Benefits		julia_benefits_1234	13			INCLUDE ALL EXCLUDE ALL ☐ Include ☐ Exclude		Discrepancy Type Auditor notes Verifier notes

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.](#)



Data Management Solutions

Validate ■ Create ■ Convert

Rows per page: 5 1-2 of 2

Verifier Memo

BACK NEXT OVERRIDE AS COMPLETE

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

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.

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

Assigned Verifier
Unassigned

Setup Notes

Audit Type

Comparison Type
Compare + Merge

Auditor Memo

Carrier

Created By / Auditor
maryl

EDIT

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**



Data Management Solutions

Validate ■ Create ■ Convert

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.



Edit Comparison

Comparison Name
Demo for User Guides

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type
Compare Only

Created By / Auditor
maryl

Auditor Memo

General purpose auditor notes that will be communicated to the verifier (assigned below) via automated email.

Assigned Verifier

Verifier Memo

Unassigned
companyverifier-dms
demobroker1
malanier2024

General purpose notes available to the email.

SAVE

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



Data Management Solutions

Validate ■ Create ■ Convert

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 form below to update this comparison's information.

Edit Comparison

Comparison Name

Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Resend the notification email to the assigned verifier.

RESEND

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the application, 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.

Complete

All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.

Comparison Details ▾

Select file to export ▾

BACK GO TO ALL COMPARISONS

-- Select --

Base

Secondary

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 application's key words. For a list of the keywords, please reference the Keys 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. 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
Employee SSN		
Social Security Number		
First Name		
Middle Name		
Last Name		
Display Name		
DOB		
Employment Status		
Testing Scenario		
Monthly Premium		

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

☐ Share with Organization

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.

==	Middle Name	
	DOB	
==	Last Name	

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



Data Management Solutions

Validate ■ Create ■ Convert

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIEDEXPORT VERIFIED RECORDS ONLY

BACKGO TO ALL COMPARISONS

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.

Optionally, check SHARE WITH ORGANIZATION to add the template to the Organization Level Template library. **Any template shared with an organization and created by an organization administrator, or an organization compare user, can be utilized under any company within that specific organization. Company admins and company compare users 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



Data Management Solutions

Validate ■ Create ■ Convert

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 or to begin a new, click GO TO ALL COMPARISONS.

Questions: Contact Support@dms-datavalidate.com



Create the Compare and Merge

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 exclusion of the compare creation can be revisited and reset if desired.

Select the Company

Select Company or click NEW to create a new company.

Data Management Solutions-DVP Internal Use

Welcome, malanier2024!

Information EDIT

Organization Name Data Management Solutions-DVP Internal Use	Users Count 2
Total Companies Count 2	Active Companies Count 2
Inactive Companies Count 0	Active Yes
Plan DVP Base 3-6	Admin & Comparer Seats 3

Companies

- DD DS: Demo Company
- MD ML: Demo Company

NEW

Create New Compare

Select NEW to begin a new comparison

ML: Demo Company

Welcome, malanier2024!

Information EDIT

Company Name ML: Demo Company	Organization Name Data Management Solutions-DVP Internal Use
----------------------------------	--

Comparisons

NEW

test
Complete



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.

New Comparison

Name

Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type

Compare & Merge

SAVE

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

Import Files



Data Management Solutions

Validate ■ Create ■ Convert

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

The screenshot shows the 'Import Data' form with the following elements:

- Import Data** header.
- Select the files to be used for comparison.** instruction.
- Baseline File** section:
 - Choose File** button and **Test Files for ...03.07.2024.xlsx** text (highlighted with a red box).
 - Select Worksheet** dropdown menu with **baseline** selected (highlighted with a green box).
 - Baseline File Name** text input with **Base** and **.xlsx** (highlighted with a blue box).
- Secondary File** section:
 - Choose File** button and **Test Files for ...03.07.2024.xlsx** text (highlighted with a red box).
 - USE BASELINE FILE** button (highlighted with a purple box).
 - Select Worksheet** dropdown menu with **secondary** selected (highlighted with a green box).
 - Secondary File Name** text input with **Secondary** and **.xlsx** (highlighted with a blue box).
- BACK** and **SAVE** buttons at the bottom.

Red dashed arrows point from the 'Choose File' buttons to the 'Select Worksheet' dropdowns. Green dashed arrows point from the 'Select Worksheet' dropdowns to the 'Baseline File Name' and 'Secondary File Name' text inputs.

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.

Optionally, check SHARE WITH ORGANIZATION to add the template to the Organization Level Template library. **Any template shared with an organization and created by an organization administrator, or an organization compare user, can be utilized under any company within that specific organization. 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.



Data Management Solutions

Validate ■ Create ■ Convert

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

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

CLEAR ALL

X
X
X
X
X
X
X

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	X
+ ADD DATA POINT	[merge] Employee SSN Social Security Number First Name		



Data Management Solutions

Validate ■ Create ■ Convert

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.

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

Import Template with Merge

Base.xlsx baseline	Secondary.xlsx secondary		
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

☐ Share with Organization

BACK

SAVE



Data Management Solutions

Validate ■ Create ■ Convert



NOTE: When using a saved template, any changes made during the audit—such as adding or removing data points—are temporary and will not modify the existing template.

To preserve changes, create a new template by entering a new template name and clicking SAVE.

For example, in the scenario below, the auditor used the Demo Import Template but removed the DOB data point. This modification is temporary and does not affect the original template. By saving with a new template name, a separate version is created without the DOB data point.

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		
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	×
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
Demo Import Template with NO DOB

☒ Share with Organization

BACKSAVE



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.

Employment Status - Employment Status X

Select Mappings or NEW MAPPINGS

Data Mappings name
Employment Status

Source Value	Target Value
Source A	Target Active X
Source T	Target Terminated X
Source L	Target Leave of Absence X

+ ADD MAPPING

SAVE MAPPINGS

If you use existing mapping, click SELECT MAPPINGS.



Data Management Solutions

Validate ■ Create ■ Convert

Employment Status Employment Status **MAP** **NONE**

Employment Status - Employment Status

Select Mappings: Employment Status or **NEW MAPPINGS**

Source Value	Target Value
Source: A	Target: Active
Source: L	Target: Leave of Absence
Source: T	Target: Terminated

SELECT MAPPINGS

[VIEW IN MAPPINGS LIBRARY](#)

Employment Status Employment Status **EMPLOYMENT STATUS** **NONE**

BACK **NEXT**

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.

Gender [merge] **GENDER** **none**

[merge] Date of Hire **MAP** **none**

Gender - null

Select Mappings: Gender or **NEW MAPPINGS**

Source Value	Target Value
Source: F	Target: Female
Source: M	Target: Male

CLEAR 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.



Data Management Solutions

Validate ■ Create ■ Convert

Data Points

'Base'	'Secondary'	Data Mappings	Date Format	Computation Function
DOB	DOB	MAP	none	
Employment Status	Employment Status	EMPLOYMENT STATUS		NONE

DOB - DOB

If one of the file's cells are not formatted as a "Date" in Excel, select the format below and the system will attempt to convert it to a date during the comparison. For unsupported date formats, you may need to re-import your file after converting the cells to a date format.

Format
MM/dd/yyyy

SAVE DATE FORMAT



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.

Data Mappings name
Deduction Code

Source Value

Source
STD

Source
STD

Target Value

Target
STD 14 day

Target
STD 30 day

Data Mappings name
Deduction Code

Source Value

Source
STD 14 day

Source
STD 30 day

Target Value

Target
STD

Target
STD

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.



Data Management Solutions

Validate ■ Create ■ Convert

Computation Function

NONE

NONE

NONE

If both files contain a numeric value, and there is a discrepancy between the two values, the system will attempt to run the selected computation function on the values. If successful, the resulting discrepancy computation value will be included on the the Discrepancy Reports.

Format

NONE

MINUS: BASELINE - SECONDARY

MINUS: SECONDARY - BASELINE

ADD

MULTIPLY

DIVIDE: BASELINE / SECONDARY

DIVIDE: SECONDARY / BASELINE

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.

Discrepancy Counts by Data Point

'Base'	'Secondary'	Computation Function	Count
DOB	DOB		1
Monthly Premium	Monthly Premium	minus: baseline - secondary	4

Missing Counts

Missing from 'Base'	Missing from 'Secondary'
1	2

Discrepancy Report

First name	Last name	Relationship	Unique Identifier	'Base' row / data point	'Secondary' row / data point	'Base' value	'Secondary' value	Computation Function Result
Katherine	Aldridge		217219160_katherine_aldrige	4 / Monthly Premium	4 / Monthly Premium	654.98	259.55	395.43



Data Management Solutions

Validate ■ Create ■ Convert

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 - Compare and Merge	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 + Merge	
Unique Identifiers ('base' - 'second') Employee SSN - Employee SSN First Name - First Name Last Name - Last Name		Data Points ('base' - 'second') DOB - DOB (date format:'MM/dd/yyyy') Monthly Premium - Monthly Premium Gender - [merge] [merge] - Date of Hire (date format:'MM/dd/yyyy')	

[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.



Data Management Solutions

Validate ■ Create ■ Convert

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.



Data Management Solutions

Validate ■ Create ■ Convert

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	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	☐ 654.98 ☐ 259.55 ☐ Overwrite ☐ Ignore	-	Discrepancy Type 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 (^)



Data Management Solutions

Validate ■ Create ■ Convert

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	'second' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Discrepancy Type / Notes
Katherine	Aldridge	4 / Monthly Premium	4 / Monthly Premium	654.98 259.55 Overwrite Ignore	-	Discrepancy Type Auditor notes Verifier notes	

KatherineAldridge4 / Monthly Premium4 / Monthly PremiumIgnore

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.](#)

Rows per page: 5 1-2 of 2 < >

Verifier Memo

BACKNEXT OVERRIDE AS COMPLETE

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.



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.

Verify Discrepancies

Verify the missing discrepancies below by selecting whether or not the missing records should be included or excluded in the verified output files. 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	Unique Identifier	'base' row	'second' row	Duplicate unique identifier row	Verified Inclusion	Last Verified By	Discrepancy Type / Notes
Julia	Benefits		julia_benefits_1234	13			INCLUDE ALL EXCLUDE ALL ☐ Include ☐ Exclude		Discrepancy Type Auditor notes Verifier notes

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.](#)



Data Management Solutions

Validate ■ Create ■ Convert

Rows per page: 5 1-2 of 2

Verifier Memo

BACK NEXT OVERRIDE AS COMPLETE

Verifier Memo

General purpose notes available to the assigned verifier, that (if a verifier is assigned) will be communicated back to the auditor via automated email.

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.

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

Assigned Verifier
Unassigned

EDITOR

Auditor Memo

EDITOR

Setup Notes

Carrier

Audit Type

Created By / Auditor
maryl

Comparison Type
Compare + Merge

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**



Data Management Solutions

Validate ■ Create ■ Convert

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.



Edit Comparison

Comparison Name
Demo for User Guides

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Comparison Type
Compare Only

Created By / Auditor
maryl

Auditor Memo

General purpose auditor notes that will be communicated to the verifier (assigned below) via automated email.

Assigned Verifier

Verifier Memo

Unassigned
companyverifier-dms
demobroker1
malanier2024

General purpose notes available to the email.

SAVE

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



Data Management Solutions

Validate ■ Create ■ Convert

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 form below to update this comparison's information.

Edit Comparison

Comparison Name

Demo - Compare and Merge

Audit Type

Carrier

Visit the [Carriers](#) page to add carriers for your company.

Setup Notes

Resend the notification email to the assigned verifier.

RESEND

Complete the Compare

Data verification is complete.

If the audit was assigned to a specific user within the application, 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.

Complete

All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.

Comparison Details

Select file to export

BACKGO TO ALL COMPARISONS

-- Select --
Base
Secondary

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 application's 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

☐ Share with Organization

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.

Middle Name	
DOB	
Last Name	

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



Data Management Solutions

Validate ■ Create ■ Convert

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIEDEXPORT VERIFIED RECORDS ONLY

BACKGO TO ALL COMPARISONS

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.

Optionally, check SHARE WITH ORGANIZATION to add the template to the Organization Level Template library. **Any template shared with an organization and created by an organization administrator, or an organization compare user, can be utilized under any company within that specific organization. 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



Data Management Solutions

Validate ■ Create ■ Convert

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 or to begin a new, click GO TO ALL COMPARISONS.

Questions: Contact Support@dms-datavalidate.com

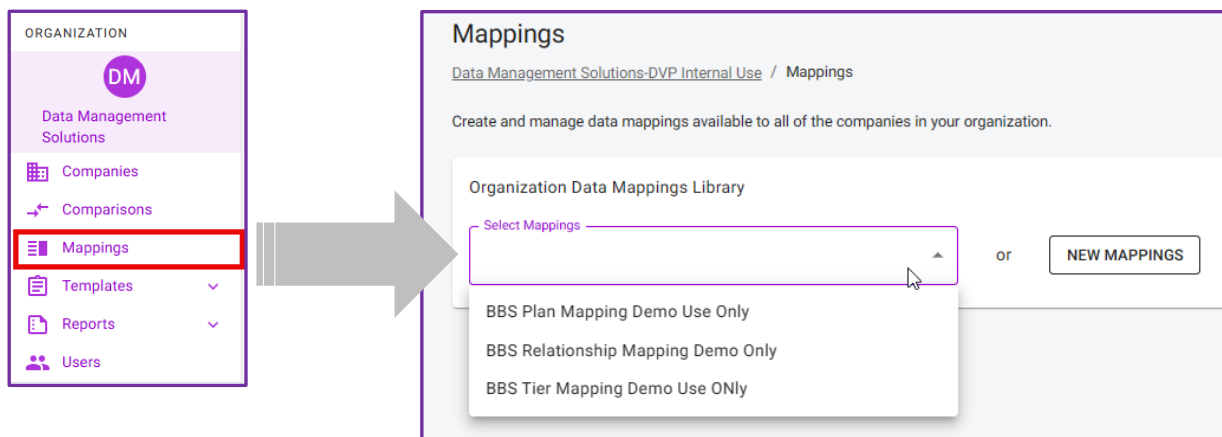


Create Organization Level Mapping

The Data Management Solutions application offers Organization Level mapping that can be used across multiple companies. This eliminates the need to create duplicate mappings such as coverage tier and relationship per company.

MAPPINGS under Organization Menu

New Mappings created at the Organization Level are automatically available to all companies within the organization.



The mapping creation level as well as when and who updated the mapping will be indicated below the mapping. Mappings can only be edited/deactivated/deleted at the creation level.



Data Management Solutions

Validate ■ Create ■ Convert

Organization Data Mappings Library

Select Mappings Relationship Mapping Demo Only or NEW MAPPINGS

Last updated on 11/21/2023 by: dsmith

Source Value Source SUBSCRIBER Target Value Target Employee

(DMS admin mappings can only be edited in the DMS admin mappings library)

NEW MAPPINGS

This begins the mapping creation process.

Organization Data Mappings Library

Select Mappings or NEW MAPPINGS

Name Mapping

Add an easily identifiable and relevant mapping name. Best practice is to use the data points in the mapping name. For example: BCBS Coverage Tier – EN Coverage Tier. Try to avoid names such as Mapping #1.

Organization Data Mappings Library

Select Mappings or NEW MAPPINGS

Data Mappings name

Source Value Target Value

+ ADD MAPPING SAVE MAPPINGS



Source and Target Values

Enter the Source and Target Values. This allows the system to convert the values and eliminate the need to manually change the values in the files.

Mappings

[Data Management Solutions-DVP Internal Use](#) / [Mappings](#)

Create and manage data mappings available to all of the companies in your organization.

Organization Data Mappings Library

Select Mappings

Mapping created at Org Level

 or

NEW MAPPINGS

Last updated on 3/27/2024 by: malanier2024

Source Value	Target Value
Source Medical Plan 1	Target PPO ×
Source Medical Plan 2	Target HSA ×

+ ADD MAPPING

SAVE MAPPINGS

DELETE

*** If a mapping is currently in use, it cannot be deleted or edited.

*** Deleted mappings are permanent and cannot be reversed.

Confirm below to permanently delete data mappings: BCBS Cov Type - EN Cov Level

CANCEL DELETE

CONFIRM DELETE



Data Management Solutions

Validate ■ Create ■ Convert



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.

Data Mappings name	
Deduction Code	
Source Value	Target Value
Source STD	Target STD 14 day
Source STD	Target STD 30 day

Data Mappings name	
Deduction Code	
Source Value	Target Value
Source STD 14 day	Target STD
Source STD 30 day	Target STD



Template Library

The Data Management Solutions application 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 but can be shared with the organization. To access the library, click on TEMPLATES under the company menu and then select the type of template.

PLEASE NOTE: Any data point and export template shared with an organization and created by an organization administrator, or an organization compare user can be utilized under any company within that specific organization. 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.

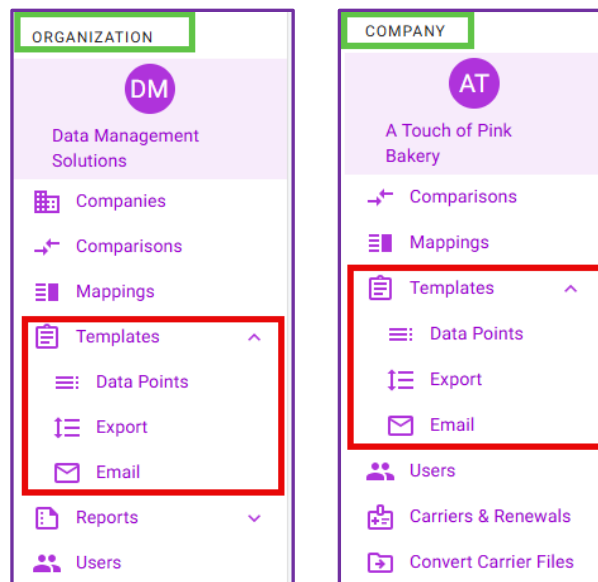
The email template library contains the default system generated emails for both the auditor and the verifier on both the organization and company levels. **Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.**

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 application will use the organization-level customization.
3. Default System Emails: If no customization is made at either level, the application 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 Management Solutions

Validate ■ Create ■ Convert

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



Adding and Removing Companies

Companies can be added or deactivated in the application as needed by the subscriber. A company export file for your specific organization is also available and will include the following fields:

- Company name
- Active status
- Updated at timestamp
- Termination date and reason
- Activation date
- First demo date
- Any associated notes

Please note that only Organization Admins have the ability to deactivate a company.

Import Companies

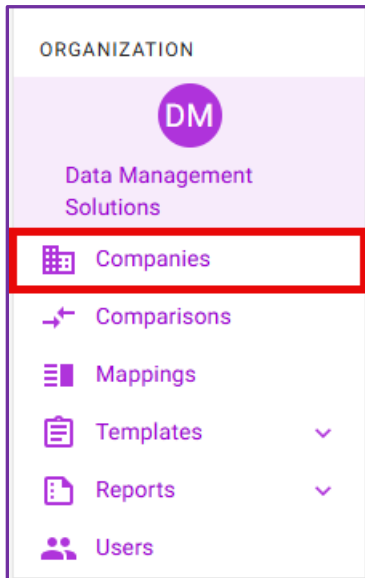
The Data Management Solutions application provides the option to import companies into an organization as well as adding them manually. Using the provided import template, all companies can now be easily added to eliminate manual entry.

Companies can be imported into an organization by selecting Companies in the Organization menu.



Data Management Solutions

Validate ■ Create ■ Convert

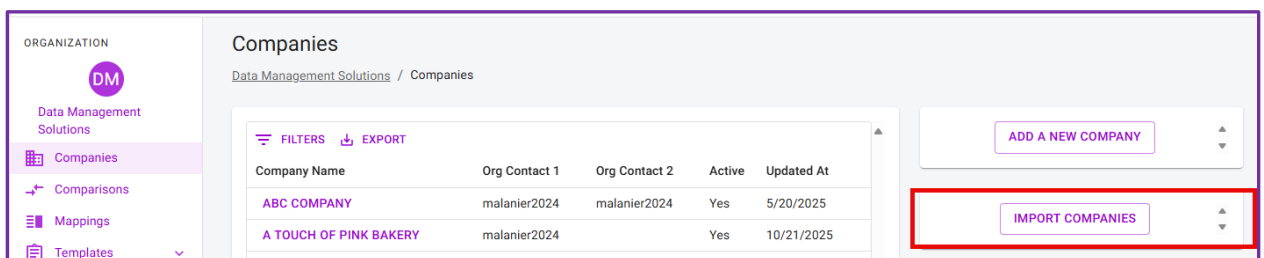


Using the provided import template, complete the following fields:

- Company name (Required)
- Notes (Optional)
- First demo date (Optional)
- Activation date (Optional - effective date of company in the application)
- Primary Organization Contact Username (Optional)
- Secondary Organization Contact Username (Optional)
- Organization Benefit Admin System (Optional)

Note: The Organization Benefit Admin System must already exist under the organization for the import to succeed.

Including any additional columns will cause the import to fail.





Choose file and click IMPORT.

Import Companies

The file should be an Excel file matching the downloadable import template structure. Any additional columns or cells not formatted as Text, will cause the import to fail.

Choose File

dms-compani...rt-template.xlsx

IMPORT

Manually add a Company

A company can be manually added to the application by clicking COMPANIES in the left-hand menu and then ADD A NEW COMPANY.

ORGANIZATION

DM

Data Management Solutions

Companies

Comparisons

Mappings

Templates

Companies

Data Management Solutions / Companies

FILTERS

EXPORT

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025

ADD A NEW COMPANY

IMPORT COMPANIES

Add the following:

- Company name (Required)
- Activation date (Optional - effective date of company in application)
- First demo date (Optional)
- Primary Organization Contact (Optional – select from available dropdown. Only Admins and Comparers are included)
- Secondary Organization Contact (Optional – select from available dropdown. Only Admins and Comparers are included)
- GA Renewal Contact (This field is only available to DMS/BBS application users)



- Benefit Admin System (Optional - select from available dropdown)
- Notes (Optional)

Once all information has been added, click SAVE.

New Company

Name

Activation Date 

First Demo Date 

Primary Organization Contact 

Secondary Organization Contact 

GA Renewal Contact 

Benefit Admin System 

Notes

SAVE

[Deactivate a Company](#)

To deactivate a company, click EDIT



Data Management Solutions

Validate ■ Create ■ Convert

Information

EDIT

Company Name

A Touch of Pink Bakery

Organization Name

Data Management Solutions

In the available screen uncheck ACTIVE and enter a termination date and a termination reason for the deactivation. Click Save. **Please note that the date has to be current or past. Future termination dates are not available.**

Edit Company

Company Name

A Touch of Pink Bakery

Notes

Active

☐ Active

Termination Date

Termination Reason

Activation Date

First Demo Date



Benefit Administration System Tracking

The Data Management Solutions application provides the option to track the benefit administration systems used for the organization which will then be available for selection at the Company Level. The tracking table is located on the Organization landing page.

Data Management Solutions-DVP Internal Use

Welcome, maryll!

Information

Organization Name

Data Management Solutions-DVP Internal Use

Users Count

3

Total Companies Count

11

Active Companies Count

8

Inactive Companies Count

Active

Companies

ABC Company

Demo Company 1

DS: Demo Company

JB: Test company

Benefit Admin Systems

Employee Navigator

Notes: EN contract began 01/01/2020

Selerix

Notes: Selerix contract began 01/01/2022

Other 2

Notes: Other added 04.29.2025

Service Types

BBS License

Cost: 89.99

Billing Frequency: Monthly

Notes: This was the first service type

Audit Services

Cost: 547.00

Billing Frequency: Quarterly

Notes: Audit services are billed quarterly

[Add a Benefit Admin System](#)

Navigate to the Organizations landing page as seen in the image above.

Click NEW



Data Management Solutions

Validate ■ Create ■ Convert

Benefit Admin Systems

NEW

- Employee Navigator
Notes: EN contract began 01/01/2020
- Selerix
Notes: Selerix contract began 01/01/2022
- Other 2
Notes: Other added 04.29.2025

Click NEW BENEFIT ADMIN SYSTEM

Organization Benefit Admin Systems

Select Existing Benefit Admin System or **NEW BENEFIT ADMIN SYSTEM**

Select the benefit admin system from the available dropdown.

New Benefit Admin System

Employee Navigator

Ease

Selerix

Plan Source

BSwift

Other

Other 2

Other 3

Add any notes pertaining to the system and click SAVE. This system is now available to be added to a Company.



Data Management Solutions

Validate ■ Create ■ Convert

Organization Benefit Admin Systems

Select Existing Benefit Admin System ▼ or [NEW BENEFIT ADMIN SYSTEM](#)

New Benefit Admin System ▼
Employee Navigator

Notes

[SAVE](#)

Edit/Delete a Benefit Admin System

Navigate to the Organizations landing page

Click on the system that you want to edit or delete.

[Benefit Admin Systems](#) [NEW](#)

	Employee Navigator Notes: EN contract began 01/01/2020
	Selerix Notes: Selerix contract began 01/01/2022
	Other 2 Notes: Other added 04.29.2025

Currently the only field that can be edited is NOTES. Adjust as needed and click SAVE.

To delete the system from the Organization, simply click DELETE. However, please note that if the system is currently in use under a company, the system cannot be deleted. The system will need to be deleted from ALL companies in order to delete.



Data Management Solutions

Validate ■ Create ■ Convert

Organization Benefit Admin Systems

Select Existing Benefit Admin System

Employee Navigator

or

NEW BENEFIT ADMIN SYSTEM

Benefit Admin System

Employee Navigator

Notes

EN contract began 01/01/2020

SAVE

DELETE



Service Type Tracking

The Data Management Solutions application allows tracking of service types used by the organization. **This information is view-only and accessible exclusively to the designated Billing Contact.** The service type table remains hidden from users who are not designated as the Billing Contact.

Billing Contact:

Benefit Admin Systems	Service Types
- Employee Navigator Notes: EN contract began 01/01/2020 - Selerix Notes: Selerix contract began 01/01/2022 - Other 2 Notes: Other added 04.29.2025	- BBS License Cost: 89.99 Billing Frequency: Monthly Notes: This was the first service type - Audit Services Cost: 547.00 Billing Frequency: Quarterly Notes: Audit services are billed quarterly

Non-Billing Contact:

Benefit Admin Systems	Service Types
- Employee Navigator Notes: EN contract began 01/01/2020 - Selerix Notes: Selerix contract began 01/01/2022 - Other 2 Notes: Other added 04.29.2025	

The Service Type Tracking and the designated Billing Contact is managed by the Broker Builder Solutions/Data Management Solutions team and cannot be changed by an Organization user.



Carrier Tracking

The Data Management Solutions application provides the option to import or to manually add carrier information for a company. Using the provided template the following information can be imported into the application:

- Company Name (**Required** and must match company name in application)
- Carrier Name (**Required** and must match carrier name found in Import Template)
- Group Number (**Required**)
- 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 can only be imported under the organization but can be manually added under on the Company level.



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

Import Carriers

The Import Carriers button can be found on the Organization level under the Companies page.

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025
BRITTANY DEMO	brokerverifier		Yes	9/10/2025
CARLA DEMO	brokerverifier		Yes	9/10/2025
CAULIFLOWER TESTING (INACTIV...			No	10/10/2025
CITY OF BRIDGERTON (INACTIV...			No	10/10/2025
DEMO COMP-08082024 (INACTIV...			No	10/10/2025

Using the provided import template, complete all required fields:

- Company Name: The company name must match the company name that is currently in the application. If the name does not match, the application will not be able to add the carrier information. (Required)
- Carrier Name: The available carriers are provided on a separate reference tab (Carriers(reference)) in the import template. 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 \(dms-datavalidate.com\)](https://dms-datavalidate.com) (Required)
- Group Number: This is a free-from field for the Group Number assigned to the Company by the carrier. (Optional).
- Renewal Month (Required)
- Renewal Kickoff Days In Advance (Optional)
- Carrier Invoice Day Of Month (Optional)
- Eligibility Management Type (Optional- Eligibility Reference tab available in import template)
- Carrier Inception Date (Optional)
- Carrier End Date (Optional)
- Disable Renewals (Optional)
- 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)
- Organization Eligibility Contact Username (Optional)
- Organization Audit Contact Username (Optional)

The completed template can then be selected using the Choose File button and then IMPORT.

Import Company Carriers

[Data Management Solutions-DVP Internal Use](#) / [Companies](#) / Import Company Carriers

Import an Excel file to bulk import multiple carriers for any of your organization's companies in a single step.

Import Companies

The file should be an Excel file matching the downloadable import template structure. Any additional columns, invalid carriers, invalid companies, or cells not formatted as Text, will cause the import to fail.

Choose File

Carrier Import.xlsx

IMPORT

DOWNLOAD IMPORT TEMPLATE

Manually add Carriers

Carrier information can also be manually added on the Company level by selecting Carriers & Renewals from the left menu.



Data Management Solutions

Validate ■ Create ■ Convert

COMPANY

AT

A Touch of Pink Bakery

↔ Comparisons

☰ Mappings

📄 Templates ▾

👤 Users

📁 Carriers & Renewals

📁 Convert Carrier Files

Click NEW

Carriers

🔍 FILTERS

📄 EXPORT

Carrier	Group Number	Renewal Month	Active
ADMIN AMERICA	7841	November	Yes
AMERITAS GROUP	AMG-123	December	Yes

✎ NEW

Complete all required fields highlighted in red and any optional fields highlighted in yellow, if applicable. 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.



Data Management Solutions

Validate ■ Create ■ Convert

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



Carrier Plan Tracking

The Data Management Solutions application provides the option to manually add carrier plan information for a company and a specific carrier as well as an import option. The following information can be added to the application:

- 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.

Import Plan

Carrier specific plans can be imported into the application. Using the provided carrier import template you can import the following fields:

- Company Name (Required)
- Carrier Name (Required – Carrier reference tab included in template)
- Plan Name (Required)
- Benefit Type (Required- Benefit Types reference tab included in template)
- Group Number (Optional)
- Eligibility Management Type (Optional)
- Disable Renewals (Optional)
- Notes (Optional)



Data Management Solutions

Validate ■ Create ■ Convert

The Import Carriers button can be found on the Organization level under the Companies page.

Company Name	Org Contact 1	Org Contact 2	Active	Updated At
ABC COMPANY	malanier2024	malanier2024	Yes	5/20/2025
A TOUCH OF PINK BAKERY	malanier2024		Yes	10/21/2025
BRITTANY DEMO	brokerverifier		Yes	9/10/2025
CARLA DEMO	brokerverifier		Yes	9/10/2025
CAULIFLOWER TESTING (INACTIV...			No	10/10/2025
CITY OF BRIDGERTON (INACTIV...			No	10/10/2025
DEMO COMP-08082024 (INACTIV...			No	10/10/2025

Using the provided carrier import template, complete all required fields:

- Company Name (Required)
- Carrier Name (Required – Carrier reference tab included in template)
- Plan Name (Required)
- Benefit Type (Required- Benefit Types reference tab included in template)
- Group Number (Optional)
- Eligibility Management Type (Optional)
- Disable Renewals (Optional)
- Notes (Optional)

The completed template can then be selected using the Choose File button and then IMPORT.

Import an Excel file to bulk import multiple carrier plans for any of your organization's companies in a single step.

Import Company Carrier Plans

The file should be an Excel file matching the downloadable import template structure. Any additional columns, invalid or missing carriers, invalid companies, or cells not formatted as Text, will cause the import to fail.

All carriers **MUST** be added to the company prior to importing plans.

Choose File No file chosen

IMPORT

DOWNLOAD IMPORT TEMPLATE

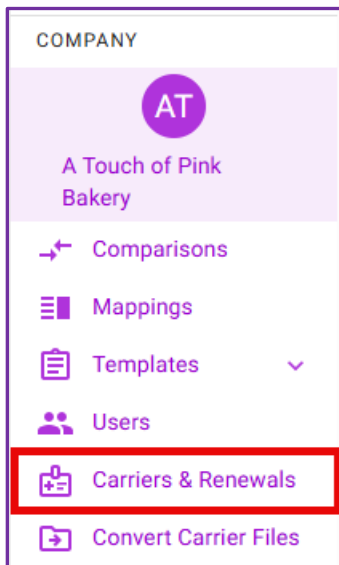


Carriers must be added to each company before importing plans. You may also import multiple plans across multiple carriers and companies in a single import



Manually Add Plan

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



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](#)

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.



Data Management Solutions

Validate ■ Create ■ Convert

Carrier Information

Carrier

CVS Caremark

Group Number

PIU-9874

Renewal Month

August

Renewal Kickoff Days In Advance

Carrier Invoice Day Of Month

1

Eligibility Management Type

Carrier Inception Date

Carrier End Date

EDIT

Carrier Plans

Plan Name	Benefit	Eligibility Management Type	Inception Date	End Date	Disable Renewals	Active
No Plans Exist						

ADD A NEW PLAN

Carrier Information

Carrier

UnitedHealthcare

Group Number

UH98745

Renewal Month

January

Renewal Kickoff Days In Advance

Carrier Invoice Day Of Month

15

Eligibility Management Type

Carrier Inception Date

Carrier End Date

EDIT

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. The fields highlighted in Green are for Agency use only and are not editable to the organization user. Click SAVE once all information has been added.



Data Management Solutions

Validate ■ Create ■ Convert

New Plan

Carrier
Admin America

Plan Name

Benefit Type

Group Number
Using Carrier Group Number: 7841

Eligibility Management Type
Using Carrier Eligibility Management Type: BBS Managed Proprietary

Disable Renewals
☐ Disable Renewals

Number of Eligible

Number of Enrolled

GA Eligibility Contact
Using GA Eligibility Contact: gaagent

GA Audit Contact
Using GA Audit Contact: gaagent

Notes

SAVE



Email Customization

The Data Management Solutions application 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 application will use the organization-level customization.
 - Default System Emails: If no customization is made at either level, the application will default to the system-generated email.

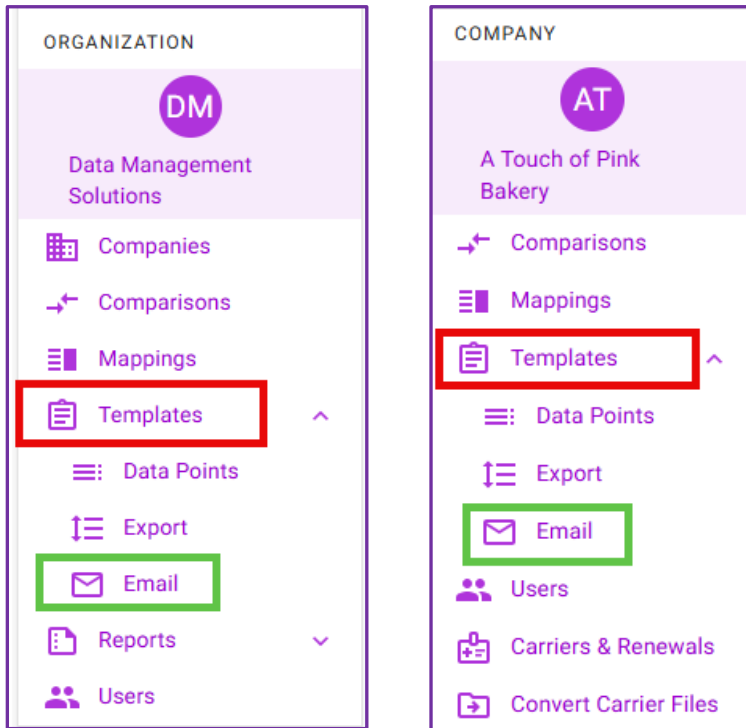
Verifier Email

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

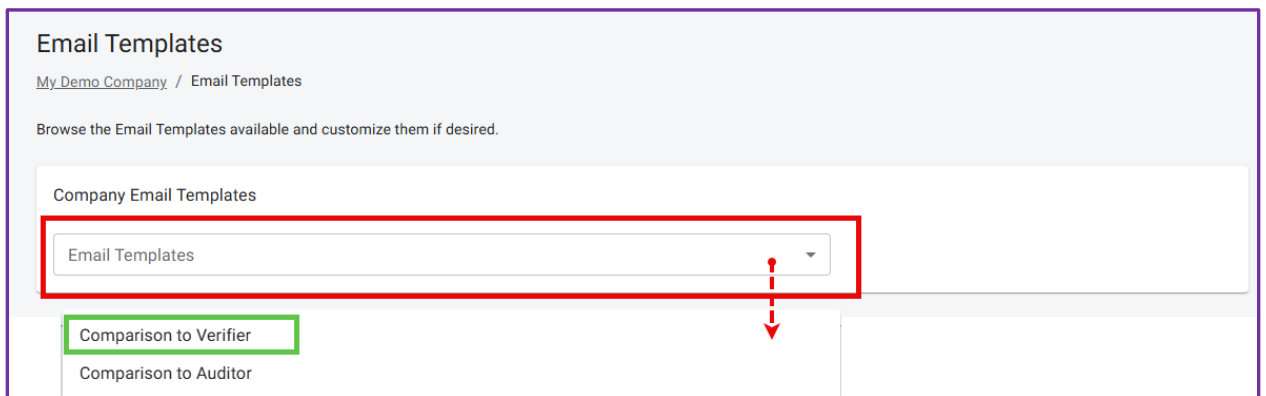


Data Management Solutions

Validate ■ Create ■ Convert



Select COMPARISON 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.



Data Management Solutions

Validate ■ Create ■ Convert

Company Email Templates

Email Templates
Comparison to Verifier 

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

Email subject

Insert token

DMS - DVP: You have been assigned as the verifier for comparison: {{comparison_name}}

Email body

Paragraph **B** *I*  Insert token

Hello {{verifier_first_name}},
{{auditor_first_name}} {{auditor_last_name}} at {{auditor_company_name_or_organization_name}} has finished auditing your data and has designated you as the verifier for this comparison: {{comparison_name}} for {{comparison_company_name}}.
{{comparison_direct_link_with_log_in_message}}
{{auditor_memo}}
Thank you,
on behalf of {{auditor_first_name}} {{auditor_last_name}}, {{auditor_company_name_or_organization_name}}

Company Email Templates

Email Templates
Comparison to Verifier  

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: You have been assigned as the verifier 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.

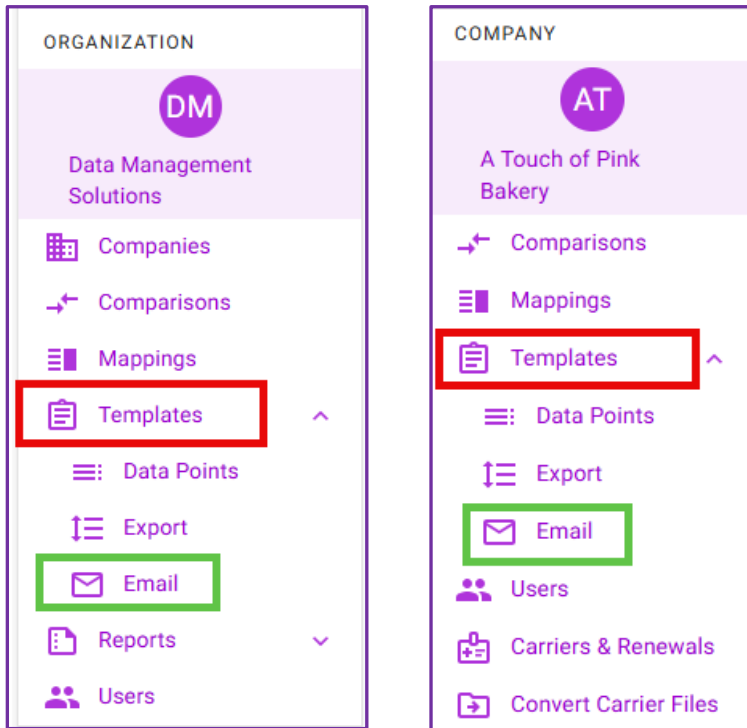
Auditor Email

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

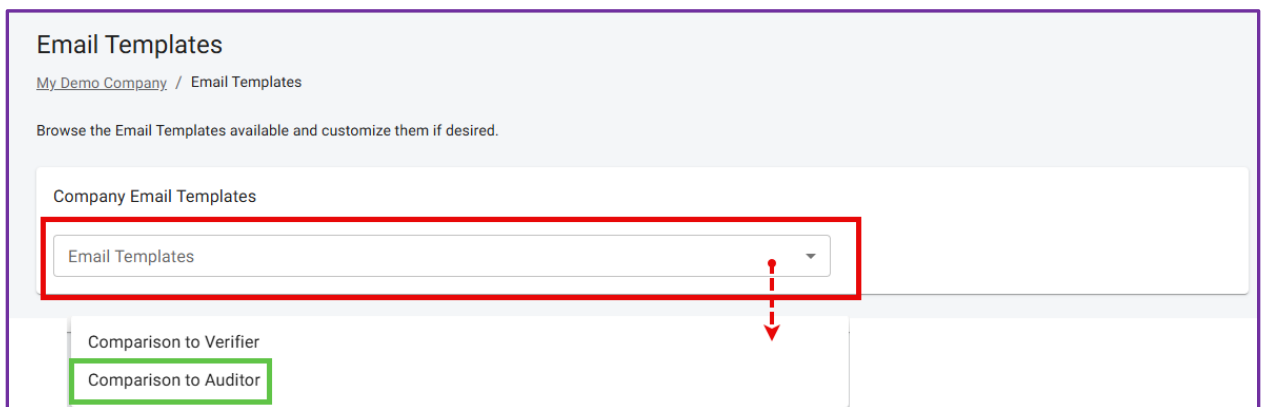


Data Management Solutions

Validate ■ Create ■ Convert



Select COMPARISON 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.



Data Management Solutions

Validate ■ Create ■ Convert

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.



Agency Task Module: Renewal Wizard

▼

The Renewal Wizard in the Data Management Solutions application is 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.

Who Does What?

GA (General Agent) → Starts the renewal, reviews/approves, enters testing details, closes task.

Organization Contacts → Provides client information, completes plans checklist, tests, and approves the renewal to Go Live.

How It Works

Step 1: GA Initiates a Renewal

- GA logs into the **Data Management Solutions application**.
- Navigate to the company with the upcoming renewal.
- Click **Carriers & Renewals → New** under the Renewal section.



Data Management Solutions

Validate ■ Create ■ Convert

Carriers

Carrier	Group Number	Renewal Month	Active
ADMIN AMERICA	7841	November	Yes
AMERITAS GROUP	AMG-123	December	Yes
ANTHEM BLUE CROSS BLUE SHIELD	9874	December	Yes
BLUE CROSS BLUE SHIELD	BC 784	November	Yes
BRIGHT BENEFITS	789522	January	Yes
LIBERTY UNION LIFE ASSURANCE C...	M987ZZ	November	Yes

Renewals

Renewal Month	Renewal Beginning Plan Year
2025, January	Client Information
2025, November	Completed
2025, December	Completed
2026, November	Review Demo Environment
2026, December	Live

- Select the **Renewal Month** and **Renewal Beginning Plan Year**, then click **Save**.

New Renewal

Renewal Month

Renewal Beginning Plan Year

SAVE

- An **automated email** notifies the designated Primary and Secondary Organization that a renewal has been created. The designated GA Renewal Contact will also receive this email.



Data Management Solutions

Validate ▪ Create ▪ Convert

BBS: Renewal Notification. You have been assigned to Full Stack Pancake Diner renewal: 2025, July. Please complete step: Client Information and Plans Checklist - Initial



notifications@dms-datavalidate.com

To: You



Thu 10/23/2025 9:46 AM

Hello [REDACTED]

The 2025, July renewal for your client, Full Stack Pancake Diner, is quickly approaching. To ensure their employee benefits enrollment portal is ready for re-enrollment, a few key steps require your attention.

Please [click here](#) to log in and complete both the Client Information and Renewal Plans Checklist.

Within the portal, you can upload all relevant plan materials, including (but not limited to) plan documents, rate sheets, and notes on any plan changes.

The client information and plans checklist should be completed at least 10 business days before your desired site open date. Updating plans for renewal, which also includes our internal QA process, takes approximately 5-7 business days. After our internal QA is complete, this allows an additional 1-2 business days for your review and feedback before the site is made available to employees.

We look forward to partnering with you to ensure a smooth and timely renewal for Full Stack Pancake Diner. If this request should be directed to another contact, please provide their information in the comments. We'll be happy to reassign the task accordingly.

Thank you,
on behalf of Mary Lanier, Broker Builder Solutions | Data Management Solutions



Note: Organization contacts and GA Renewal Contact can be found on the Company Detail page.



Information

EDIT

Company Name Fire Solutions Data Management	Organization Name Data Management Solutions: Testing
Comparisons Count 2	Users Count 3
Carriers Count 1	Active Yes
Primary Org Contact marytester (Mary Lanier)	Primary Org Contact Email
Primary Org Contact Phone	Secondary Org Contact
GA Renewal Contact mlanier (Mary Lanier)	GA Renewal Contact Email support@dms-datavalidate.com
Notes	

Step 2: Organization Completes Client Information

- The Organization will receive a Renewal Kickoff email outlining the next required actions. This email includes a link that, once logged into the application, allows the Organization user to easily access the renewal and begin **Step 1: Client Information**.
- If the Organization wants to take the lead instead of the GA, they can choose Broker Managed and assign an organization contact from the dropdown.
- The user will then complete the Required fields:
 - **Enrollment Start Date** – date the open enrollment is open to the employees
 - **Open Enrollment End Date** - date the open enrollment closes for the employee



- **Administration End Date** – date the open enrollment closes for admin users such as the HR team or Benefits Administrator
- **Enrollment Type (Active/Passive)**
- Optional (recommended) fields:
 - COBRA Enrollment Type (Active/Passive)
 - Passive Enrollment Button Enabled (Before, After, Both)
 - Send Deductions Date (if payroll integration is present)
 - Custom Enrollment Welcome & Email Language
 - Comments – **Please note that a comment can be added without submitting the Client Information for GA Review**
- Click **Submit Client Information** → GA is notified for review.



Data Management Solutions

Validate ■ Create ■ Convert

Client Information

RESEND RENEWAL KICKOFF EMAIL
Last sent 10/21/2025. Notification count: 2.

Complete the form below to submit information for this renewal to the GA Renewal Contact for review.

Broker Managed Details

Comments

Enrollment Start Date

Enrollment End Date

Administration End Date

Enrollment Type

COBRA Enrollment Type

Passive Enrollment Button Enabled

Send Deductions Date

Applicable for payroll integrations

Enrollment Welcome Language

If welcome language varies by classification please specify for each

Enrollment Email Language

If email language varies by classification please specify for each

SKIP

SUBMIT CLIENT INFORMATION

107 | Page



Step 3: Organization Completes Plans Checklist

- For each listed plan click the **Plan Name** or **Status** to review:

Plans Checklist

Each plan requires it's renewal details to be submitted before the entire plans checklist can be submitted to the GA Renewal Contact for review.

! If a new plan needs to be added please indicate in the comments when submitting the plans checklist.

Comments ▼

SUBMIT PLANS CHECKLIST

Plan Name	Carrier	Benefit Type	Status	Renewing?
2025 DENTAL HIGH	Admin America	Dental	! IN PROGRESS	
2025 MEDICAL OPTION 2-PPO PLAN	Admin America	Dental	! IN PROGRESS	

- If **not renewing** →
 - Select **NO** and add additional information to the General Plan Renewal Notes and/or Comments to indicate if the carrier is being replaced by another or any other pertinent information for the GA contact.
 - Click **Submit Plan Information** (status changes to Submitted).



Plan Name

2025 Dental High (Admin America)

Plan Details

Renewal Details

Is this plan renewing?

No

General Plan Renewal Notes

Comments

BACK

SUBMIT PLAN INFORMATION

- If **renewing** →
 - Answer additional questions for the rates, rounding, limits, contributions section, and the eligibility section.
- Upload supporting documents as needed
- Add additional pertinent information in the Comment section



Renewal Details

Is this plan renewing?
Yes

General Plan Renewal Notes

General Plan Documents

No General Plan Documents found.

ADD FILE

Are Rates, Rounding, Contributions, or Plan Limits Changing?

Rates, Rounding, Contributions, or Plan Limits Changing Notes

Rates, Rounding, Contributions, or Plan Limits Documents

No Rates, Rounding, Contributions, or Plan Limits Documents found.

ADD FILE

Is eligibility changing?

Eligibility Changing Notes

Eligibility Documents

No Eligibility Documents found.

ADD FILE

Comments

BACK SUBMIT PLAN INFORMATION

- Click **SUBMIT PLAN INFORMATION** once all selections have been made for the specific plan.



- Repeat the process above for each plan listed until all statuses have been changed from IN PROGRESS to SUBMITTED.

Plans Checklist

Each plan requires it's renewal details to be submitted before the entire plans checklist can be submitted to the GA Renewal Contact for review.

! If a new plan needs to be added please indicate in the comments when submitting the plans checklist.

Comments ▼

SUBMIT PLANS CHECKLIST

Plan Name	Carrier	Benefit Type	Status	Renewing?
2025 DENTAL HIGH	Admin America	Dental	✓ SUBMITTED	Yes
2025 MEDICAL OPTION 2-PPO PLAN	Admin America	Dental	! IN PROGRESS	

- Once all plans are submitted, click **Submit Plans Checklist** → GA is notified by an email.

Plans Checklist

Each plan requires it's renewal details to be submitted before the entire plans checklist can be submitted to the GA Renewal Contact for review.

! If a new plan needs to be added please indicate in the comments when submitting the plans checklist.

Comments ▼

SUBMIT PLANS CHECKLIST

Plan Name	Carrier	Benefit Type	Status	Renewing?
2025 DENTAL HIGH	Admin America	Dental	✓ SUBMITTED	Yes
2025 MEDICAL OPTION 2-PPO PLAN	Admin America	Dental	✓ SUBMITTED	Yes

Step 4: GA Reviews & Collaborates

- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
 - **GA Review Client Information – Approval**



After the organization contacts have entered all required information, and no further details are needed, the GA should add any desired comments and then click **APPROVE CLIENT INFORMATION**.

- GA Review Client Information – Request Changes

If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts

- GA Review Plans Checklist – Approval

For each listed plan, click the Plan Name or Status to review.

REQUEST CHANGES TO PLANS CHECKLIST				
Plan Name	Carrier	Benefit Type	Status	Renewing?
2025 DENTAL HIGH	Admin America	Dental	! GA REVIEW	Yes
2025 MEDICAL OPTION 2-PPO PLAN	Admin America	Dental	! GA REVIEW	Yes

If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION**.



- **GA Review Plans Checklist – Request Changes**

If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts

- When all plans have been approved, click **APPROVE PLANS CHECKLIST**.
- Collaboration continues until both steps are approved.

Steps 5 & 6: Testing & Go Live

- Once the Client Information and the Plans Checklist have been approved, it is time to set up the Demo Environment in the Benefit Administration System. On Step 5, the GA enters **testing details** such as demo users and instructions in the Demo Environment Notes section as well as any additional comments or files and then clicks **SUBMIT DEMO ENVIRONMENT INFORMATION**.



GA Setup Demo Environment

Please provide the demo environment information below and submit it for review by the Organization Contacts.

Demo Environment Notes

Comments

SUBMIT DEMO ENVIRONMENT INFORMATION

- Organization is notified by automated email and begins testing in the **Benefit Administration System**.
- Request Changes:
 - If changes are needed, the Organization user will add a comment and/or files requesting the change to the Benefit Administration system and click **Request Change**.
- After successful testing:
 - Organization checks all acknowledgment boxes if all testing was successful.
 - Clicks **Go Live** (button activates only when all boxes are checked).



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Review Demo Environment

The Organization Contacts will review the submitted demo environment information below and either approve or request changes.

Demo Environment Information

Demo Environment Notes

Demo Users:

username: Demo

password: Testing

Please check that all plans are visible with correct rates.

Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- ☐ Are the benefit plans associated with each class and/ or business unit showing in the open enrollment engine?
- ☐ Do ALL employee per pay deductions reflect as expected in the open enrollment engine (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- ☐ Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- ☐ Do all plan documents associated with each plan reflect as expected?
- ☐ Does all plan communication language reflect as expected?
- ☐ Are all onboarding/employee tasks showing as expected (if applicable)?
- ☐ Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE

REQUEST CHANGES



Demo Environment Review Checklist

The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- ☒ Are the benefit plans associated with each class and/ or business unit showing in the open enrollment engine?
- ☒ Do ALL employee per pay deductions reflect as expected in the open enrollment engine (Medical, Dental, Flex, Voluntary Life, Voluntary STD, Voluntary LTD, etc...?)
- ☒ Do the plan limits for any applicable H.S.A, FSA, Limited Purpose FSA, Parking, Transit, or Dependent Care FSA reflect as expected?
- ☒ Do all plan documents associated with each plan reflect as expected?
- ☒ Does all plan communication language reflect as expected?
- ☒ Are all onboarding/employee tasks showing as expected (if applicable)?
- ☒ Are all required demographic fields showing as expected for employees and dependents?

Comments

GO LIVE

REQUEST CHANGES

Step 7: Renewal Completion

- Once live, the renewal is **locked**—previous steps cannot be reopened.
- Post-Go Live:

Organization Contacts: The renewal is complete, and no further action is required. However, if changes are requested after the renewal has gone live, the organization may still add comments or upload documents linked to specific plans.

Renewal: 2025, October

[Fire Solutions Data Management](#) / [Renewals](#) / 2025, October - Live

☒ Client Information

☒ Plans Checklist

☒ GA Review Client Information

☒ GA Review Plans Checklist

☒ GA Setup Demo Environment

☒ Review Demo Environment

☒ Live

Live

This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this renewal, please submit a comment with this information below.

Comments



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✓ Client Information ✓ Plans Checklist ✓ GA Review Client Information ✓ GA Review Plans Checklist ✓ GA Setup Demo Environment ✓ Review Demo Environment ✓ Live

Live

This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this renewal, please submit a comment with this information below.

Comments

Add a comment if you'd like to provide any additional context or information.

Paragraph ▾ **B** *I*

If this comment applies to a particular Plan please select it below.

Plan ▾

Attachments

[ADD FILE](#)

[SUBMIT COMMENT](#)

- GA closes the renewal task in the system. Please notice that the **Complete & Close Task** is only available on the GA Contact access.

Renewal: 2025, October

[Fire Solutions Data Management](#) / [Renewals](#) / 2025, October - Live

✓ Client Information ✓ Plans Checklist ✓ GA Review Client Information ✓ GA Review Plans Checklist ✓ GA Setup Demo Environment ✓ Review Demo Environment ✓ Live

Live

This renewal is marked to go live! You can view the details of this renewal by viewing the information on the prior steps.

If you have any questions, or need to make changes or upload documents pertaining to this renewal, please submit a comment with this information below.

Comments ▾

[COMPLETE & CLOSE TASK](#)

- A **final closeout email** is sent, marking the renewal complete and ready for the next cycle.



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✓ With this new Renewal Wizard, GAs and Organizations have a streamlined, collaborative, and transparent process to ensure smooth renewals every year.



Carrier Invoice Conversion

The Data Management Solutions application has functionality to convert carrier invoices that are not application-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.

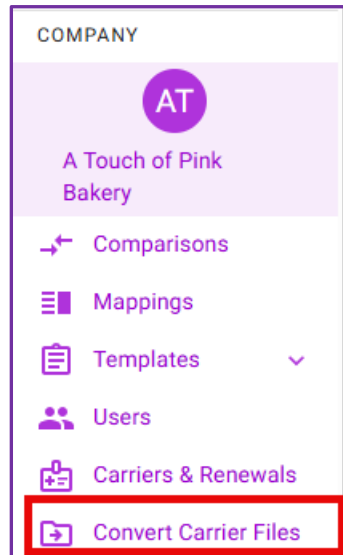
What This Functionality Does:

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.

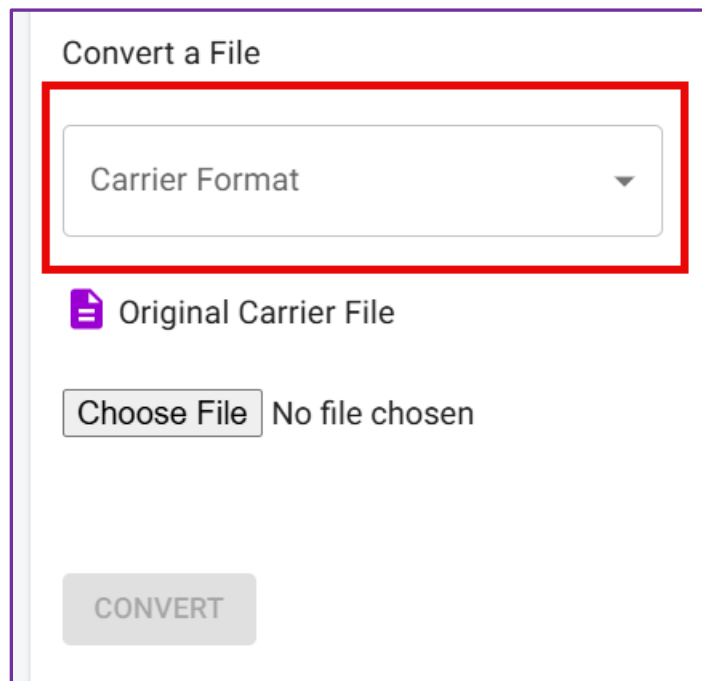
The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

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.



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



4. Click Choose File and select the carrier invoice



Convert a File

Carrier Format
Guardian Row Based ▼

Original Carrier File

Choose File No file chosen

CONVERT

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

Convert a File

Carrier Format
Guardian Row Based ▼

Original Carrier File

Choose File Guardian Row ...sed Invoice.xls

Select Worksheet
Download Bill ▼

File Name
Guardian Row Based Invoice .xls

CONVERT

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



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Validate ■ Create ■ Convert



File converted and downloaded successfully!



7. The converted file is automatically downloaded to the user's computer and is not saved in the application.
8. The file is not ready to be used in a comparison.



Reports

The Data Management Solutions application provides several downloadable reports:

Audit Reports

These reports are available for all audits once Step 5 Compare and/or Step 8 Complete have been reached.

The first set of reports are available on Step 5 Compare:

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

✓ Create — ✓ Import Data — ✓ Select Data Points — ✓ Map Data — 5 Compare — 6 Verify Discrepancies — 7 Verify Missing Data — 8 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

Missing Counts

The second set of reports are available on Step 8 Complete

- All Records Including Verified
- Verified Records Only



Data Management Solutions

Validate ■ Create ■ Convert

✓ Create — ✓ Import Data — ✓ Select Data Points — ✓ Map Data — ✓ Compare — ✓ Verify Discrepancies — ✓ Verify Missing Data — ✓ Complete

Complete

All discrepancies have been verified and this comparison is now completed! You may export the files containing the verified changes below.

Comparison Details

Select file to export

BACK GO TO ALL COMPARISONS

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.

✓ Create — ✓ Import Data — ✓ Select Data Points — ✓ Map Data — 5 Compare — 6 Verify Discrepancies — 7 Verify Missing Data — 8 Complete

View Reports

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

Select file to download

Comparison Details

Discrepancy Counts by Data Point Missing Counts

Discrepancy Reports

- Original Baseline File - discrepancies only
- Original Secondary File - discrepancies only
- Original Baseline File
- Original Secondary File

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Discrepancies Missing Data



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 5 additional columns added to the original files:

- DMS_Verified_By



Data Management Solutions

Validate ■ Create ■ Convert

- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type
- DMS_Ignored_Discrepancies

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			

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

☐ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

BACK

GO TO ALL COMPARISONS

	D	E	F	G	H	I	J	K	
1	e	DOB	Gender	Monthly Premium	Date of Hire	DMS_Verified_By	DMS_Auditor_Notes	DMS_Verifier_Notes	DMS_Ignored_Discrepancies
2		2/18/1989	Male	259.55	5/1/2024				
3		1/3/1975	Female	259.55	5/4/1995				
4		1/6/1980	Male		5/5/1995	[Monthly Premium]: malanier2024	[Monthly Premium]: dfaasfas		

Verified Records only



Data Management Solutions

Validate ■ Create ■ Convert

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 4 additional columns added to the original files:

- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type

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			

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

☐ Share with Organization

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

EXPORT VERIFIED RECORDS ONLY

BACK

GO TO ALL COMPARISONS

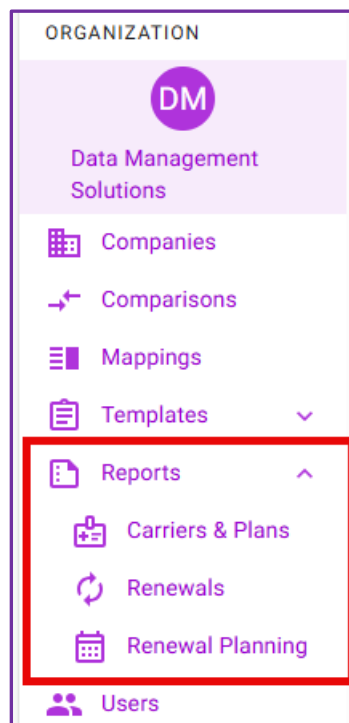
	A	B	C	D	E	F	G	H	I	J
1	Employee	First Name	Last Name	DOB	Gender	Monthly P	Date of Hire	DMS_Verified_By	DMS_Auditor_Notes	DMS_Verifier_Notes
2	217-21-91	Katherine	Aldridge	1/6/1980	Male		5/5/1995	[Monthly Premium]: m	[Monthly Premium]: df	
3	217-21-57	Michael	Bebe	8/9/1972	Female		5/12/1995	[Monthly Premium]: m	[Monthly Premium]: as	
4	555-66-12	Julia	Benefits	#####	Female	259.55		malanier2024		
5	224-11-85	SHEILA	CARTER		Male	259.55	5/23/1995	[DOB]: malanier2024	[DOB]: asd	

Ignored Records will **not** show in the *Verified Records only* report.



Organization Reports

There are several reports that live on the Organization level: Carriers & Plan, Renewals and Renewal Planning. This new 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.



Carriers & Plans: This report provides a list of all carriers and their corresponding plans by company, including key details for each carrier and plan.



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Carriers & Plans

[Data Management Solutions: Testing](#) / Carriers & Plans

The table below shows all of the carriers and plans across your organization.

FILTERS		EXPORT			
Company	Carrier Name	Renewal Month	Plan Name	Benefit Type	Group Number
ABC COMPANY	ALLIANT HEALTH PLAN	October	2025-2026 PLAN 2	Vision	11111111111
ABC COMPANY	ALL ONE HEALTH	December	ONE PLAN DECEMBER	HRA	
ABC COMPANY	AMERIHEALTH ADMINISTRAT...	August	2025 DENTAL HIGH	Dental	8745
ABC COMPANY	ANTHEM LIFE INSURANCE CO...	September	2025	Medical	12555
ABC COMPANY	ASSURANT	January	(n/a)	(n/a)	78945613
ABC COMPANY	ASSURITY LIFE INSURANCE C...	June	(n/a)	(n/a)	zxcvzxc
ABC COMPANY	AUXIANT	February	(n/a)	(n/a)	987452
ABC COMPANY	AVESIS	January	(n/a)	(n/a)	

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Renewal: This report provides a summary of all renewals within your organization, grouped by company, and includes key details for each renewal. Please note that the exported file from this table contains additional key indicators related to each renewal.



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Renewals

[Data Management Solutions](#) / [Renewals](#)

The table below displays a summary report of all renewals in your organization. Additional details, including the status of each step, the number of days since each step was updated, and more, are visible when exporting the table.

FILTERS		EXPORT				
	Company	Renewal Year	Renewal Month	Kickoff Date	Last Kickoff Reminder Sent	Current Step
VIEW	ABC COMPANY	2025	June	8/15/2025	8/15/2025	Live
VIEW	FULL STACK P...	2025	July	10/23/2025	10/23/2025	Client Information
VIEW	FULL STACK P...	2025	June	10/23/2025	10/23/2025	Client Information
VIEW	A TOUCH OF PI...	2025	January	10/21/2025	10/21/2025	Client Information
VIEW	A TOUCH OF PI...	2026	December	9/23/2025	9/23/2025	Live
VIEW	A TOUCH OF PI...	2026	November	9/16/2025	9/16/2025	Review Demo Environment
VIEW	BRITTANY DEMO	2026	January	9/30/2025	9/30/2025	Review Demo Environment
VIEW	DS: DEMO COM...	2026	March	9/30/2025	9/30/2025	Client Information

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Renewal Planning: This table displays the month(s) in which each company is scheduled for renewal. Unlike the Renewal Report, this view only reflects when a renewal is expected to occur based on the renewal month specified for the



carrier.

Renewal Planning

[Data Management Solutions](#) / [Renewal Planning](#)

The table below shows the month(s) that each company in your organization will be undergoing a carrier renewal. Companies that have no carriers in the system are excluded.

FILTERS EXPORT									
Company	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
ABC COMPANY	✓					✓			
A TOUCH OF PINK BAK...	✓								
BRITTANY DEMO	✓								
CARLA DEMO									
DESTINY DEMO									
DS: DEMO COMPANY	✓	✓	✓						
FULL STACK PANCAKE...	✓					✓	✓		
HEATHER DEMO	✓								

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Key Words

The application 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 Management Solutions application provides a knowledge base for frequently asked questions.

[DV Platform Knowledge Base - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)

Benefit Systems



The Data Management Solutions application provides instructional videos for various carrier files for enrollments and invoices.

[DV Platform Benefit Systems - DMS Data Validate \(dms-datavalidate.com\)](https://dms-datavalidate.com)

Release Notes



The Data Management Solutions application release notes are available through our website for reference.

[Release Notes Log - DMS Data Validate \(dms-datavalidate.com\)](https://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	03/21/2023	Updated instructions for Template Enhancements	Mary Lanier
2.1	07/24/2023	Updated instructions for Additional User Types, Inactivate Users. Added "memberid" to SSN keyword, Added Sample registration email	Mary Lanier
2.2	11/29/2023	Updated email address from datatool@brokerbuildersolutions.com to support@dms-datavalidate.com	Mary Lanier
2.3	03/26/2024	Updated logo and added additional instructions for moving templates to the organization level. Updated website references for new website.	Mary Lanier
2.4	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
2.5	07/09/2024	Updated to include carrier tracking enhancement	Mary Lanier
2.6	10/15/2024	Added verbiage to include discrepancy type dropdown, additional field to the carrier tracking information, and termination company date	Mary Lanier
2.7	12/05/2024	Updated with new enhancements including additional discrepancy reports and customized emails	Mary Lanier
2.8	02/18/2025	Updated to include the Carrier Invoice Conversion functionality	Mary Lanier
2.9	05/20/2025	Updated to include Plan Information and additional fields	Mary Lanier



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3.0	06/12/2025	Updated import functionality for carrier, carrier plans, and company	Mary Lanier
4.0	10/23/2025	Updated images	Mary Lanier