Data Management Solutions

Validate ▪ Create ▪ Convert

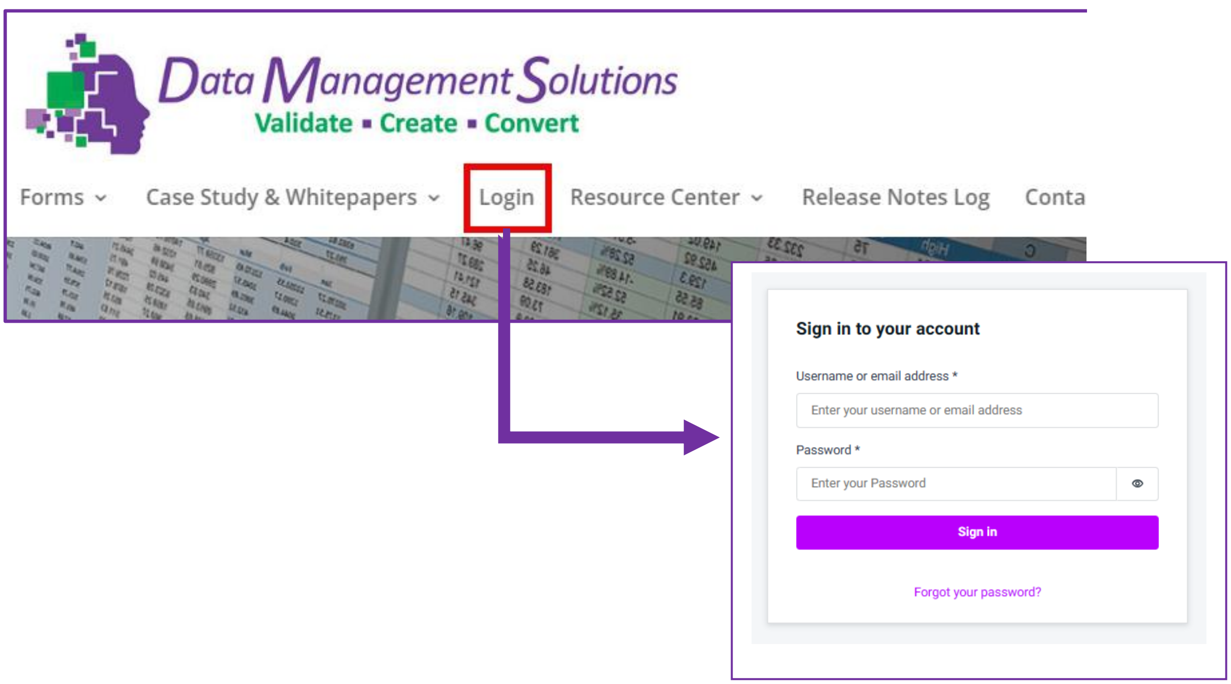
Organization User Guide

Data Management Solutions
Validate ▪ Create ▪ Convert

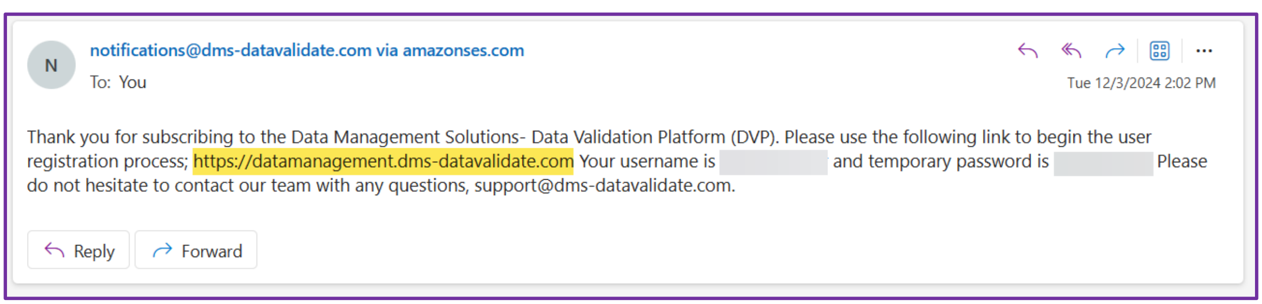
Table of Contents

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.



Registration Email Example:



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.

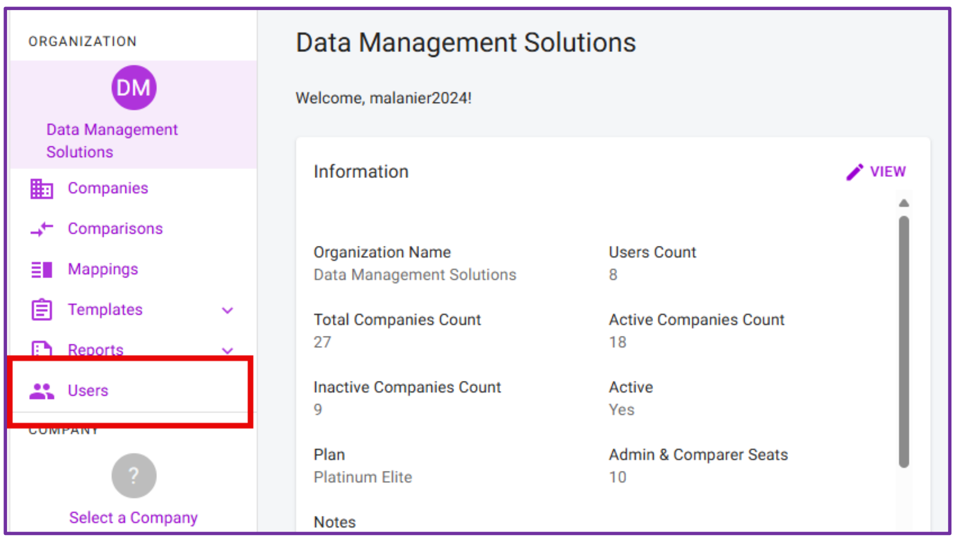
7. **Company-Level Verifier – Partial Access**
   Allows verification of discrepancies and missing data for existing compares within a single company. This role does not include compare and merge functionality.

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

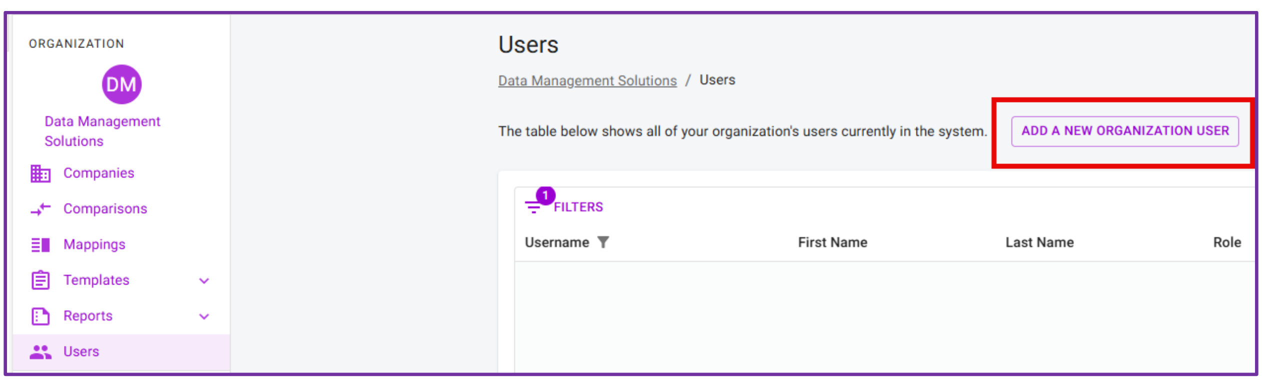
Only Organization level users are discussed in this set of instructions. Please reference the Company Level User process document for information pertaining to that level.

Adding an Organization Admin user

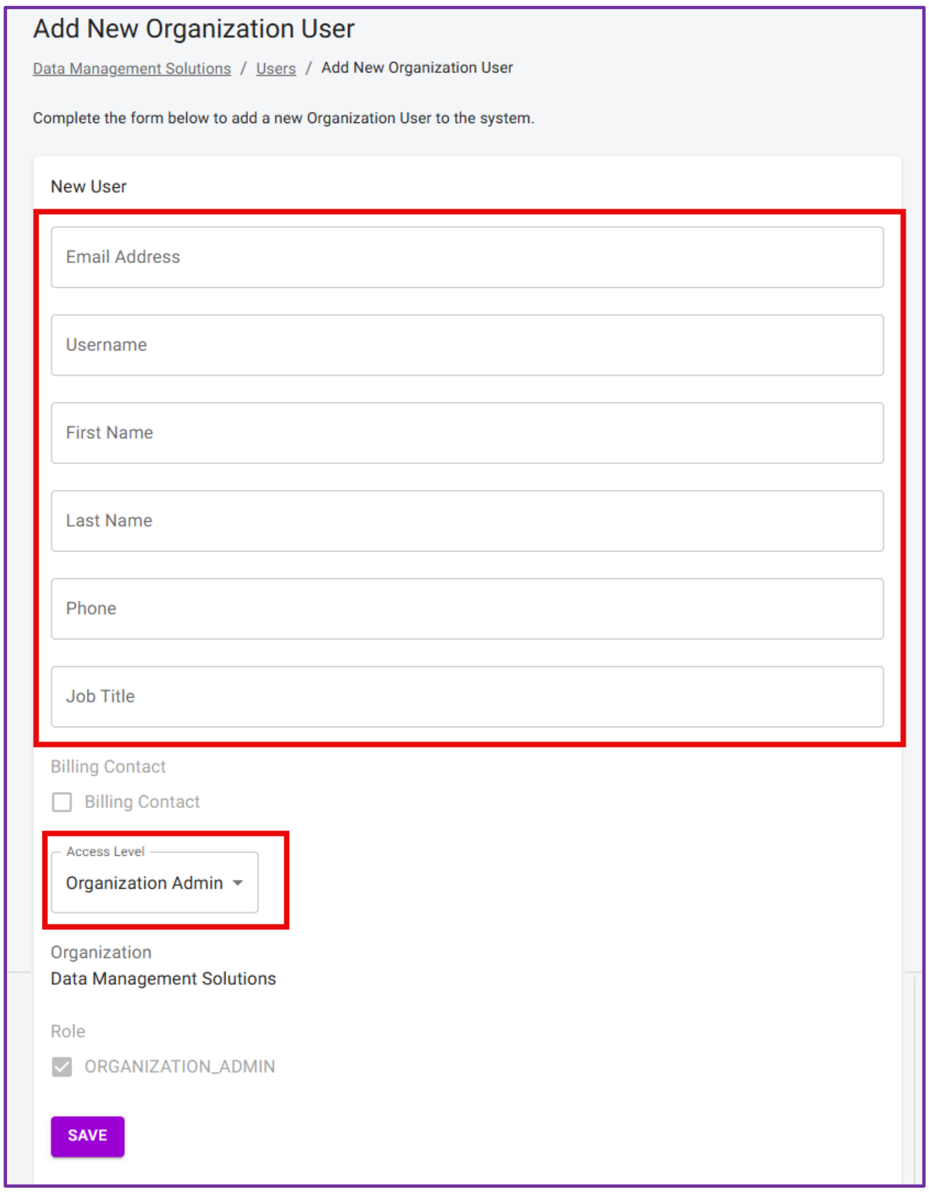
Select USERS under the desired organization.



Select 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.



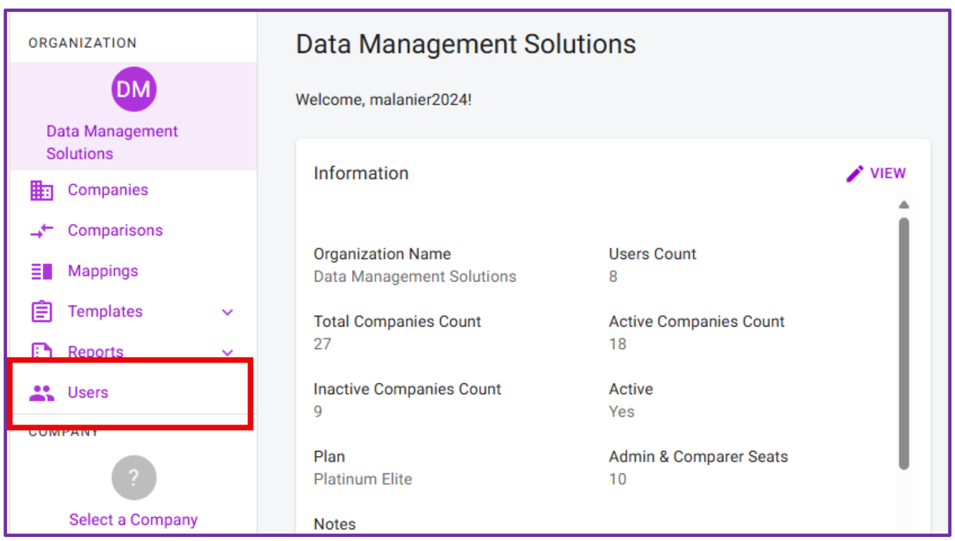
In the Access Level dropdown, select the user type: Organization Admin. This access level has full site functionality including adding and inactivating users.

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

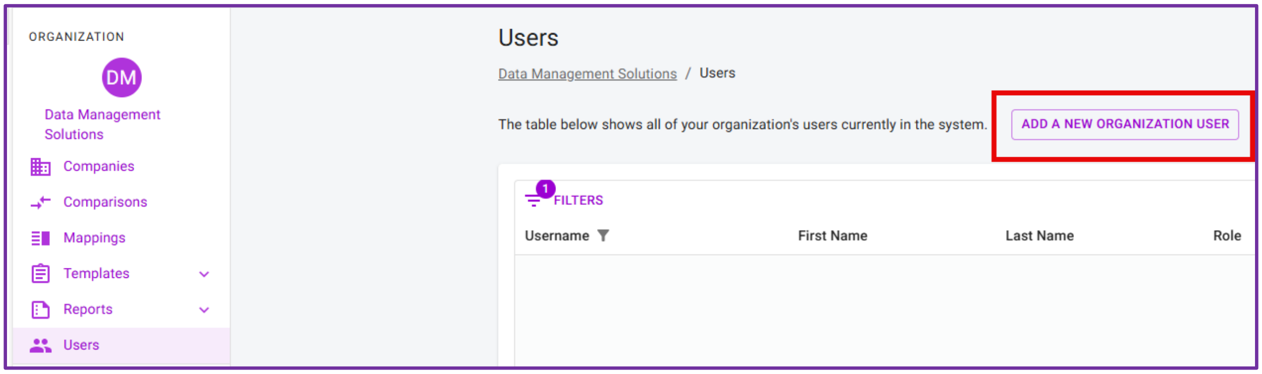
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding an Organization Comparer user

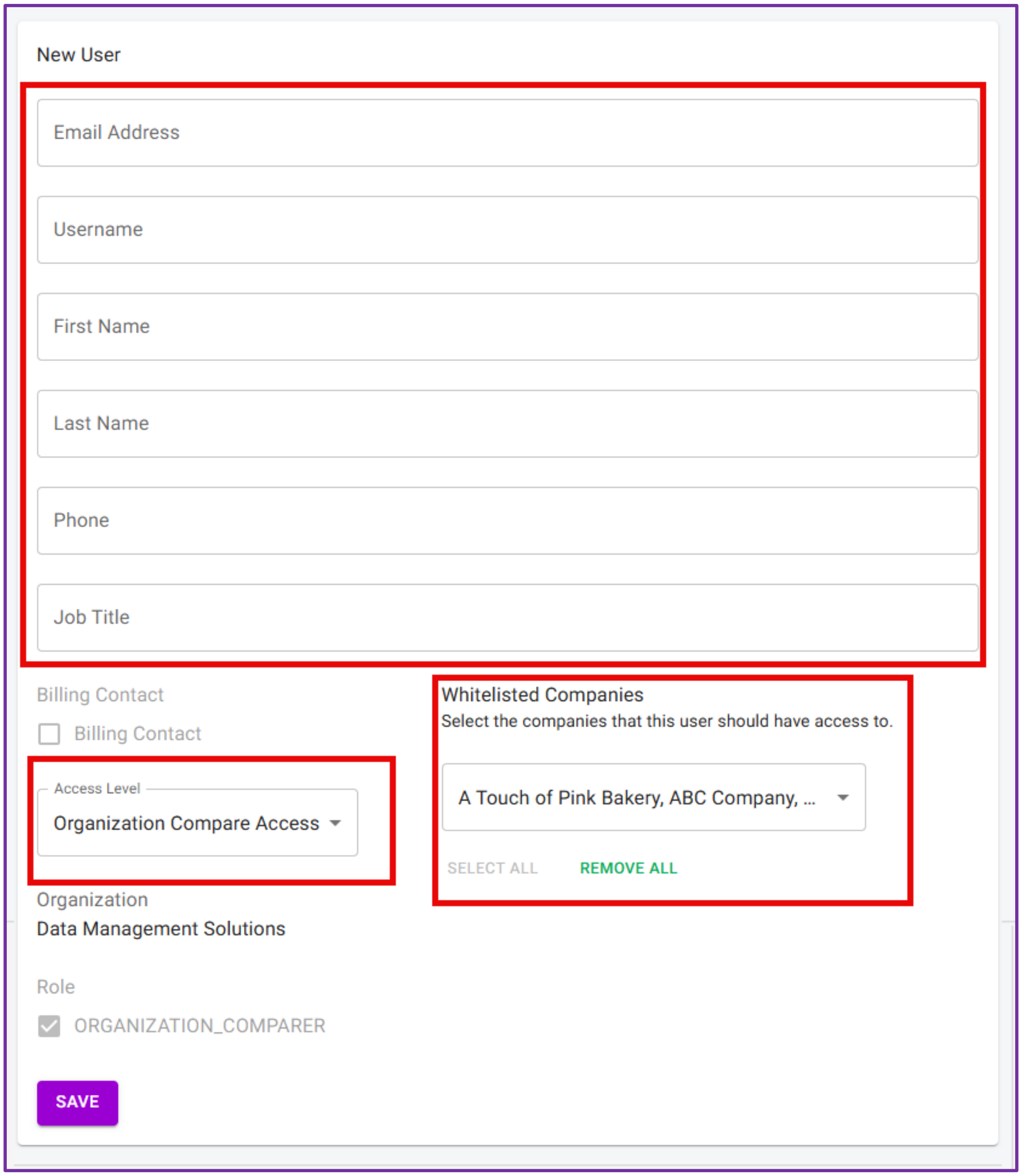
Select USERS under the desired organization.



Select 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.



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.

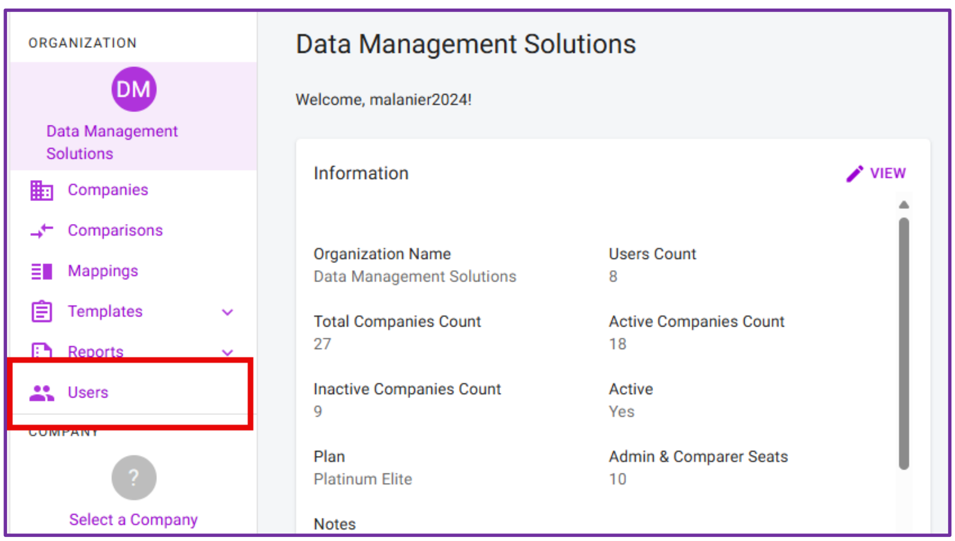
By default, this user will be whitelisted for all Companies under an Organization. Deselect all companies that the user should not have access to by selecting the dropdown and clicking the company.

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

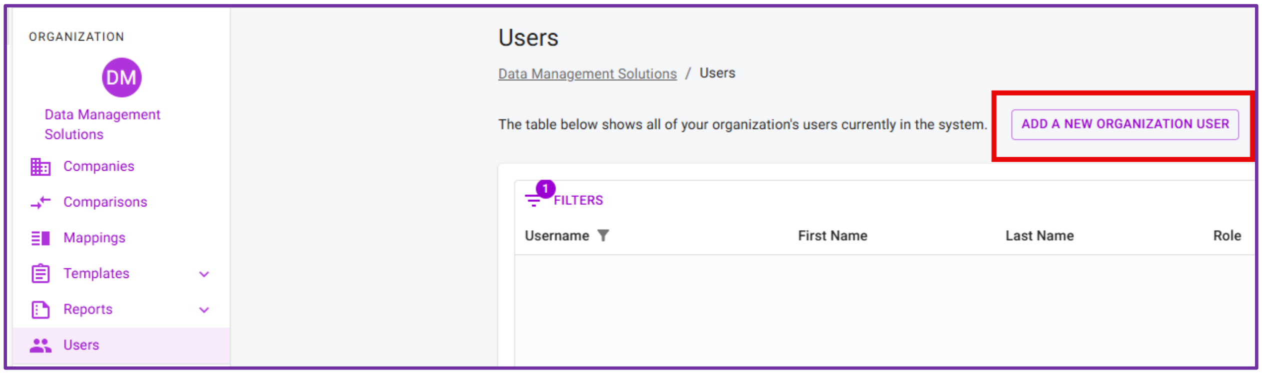
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding an Organization Task Manager user

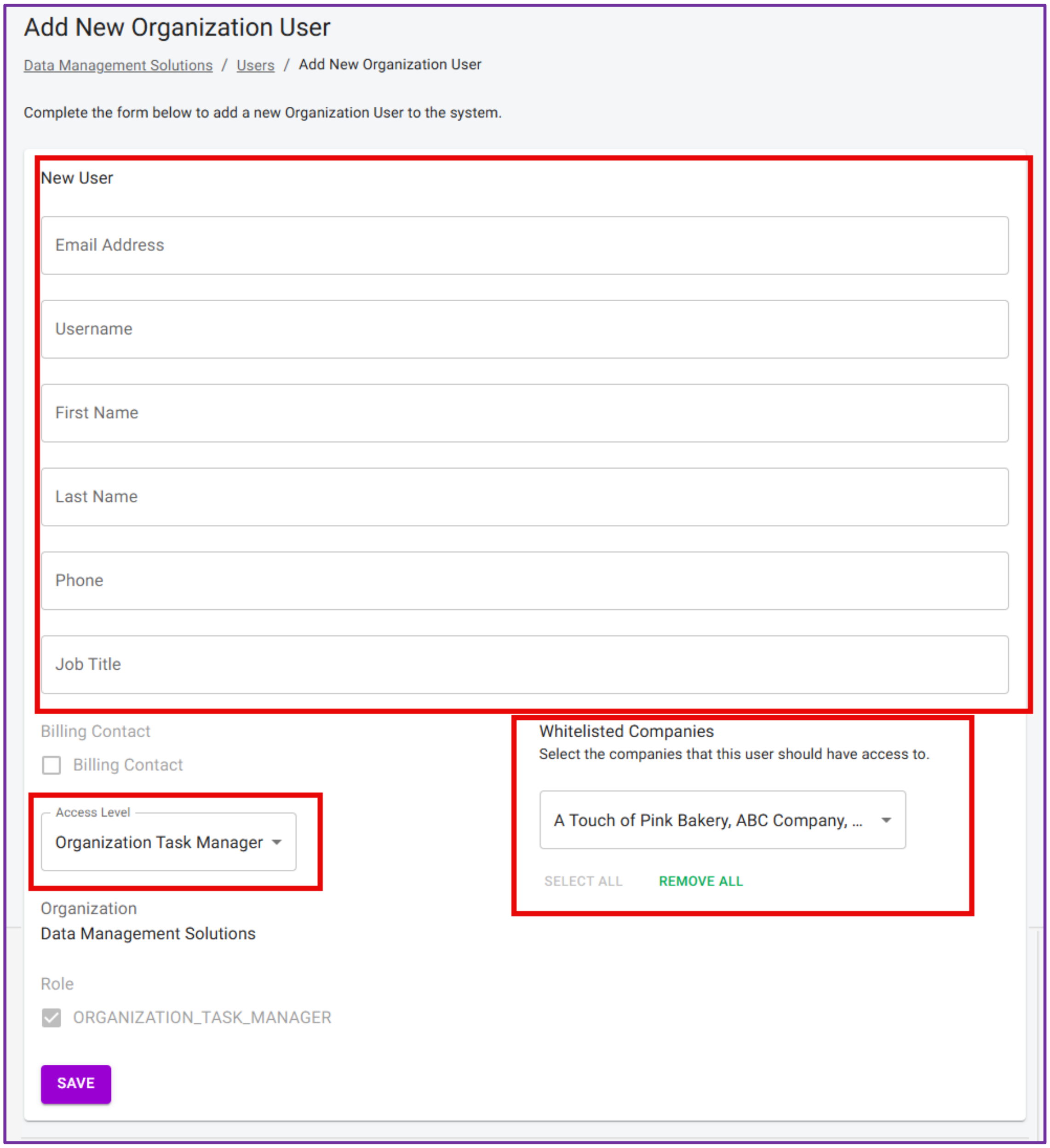
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.



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.



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.

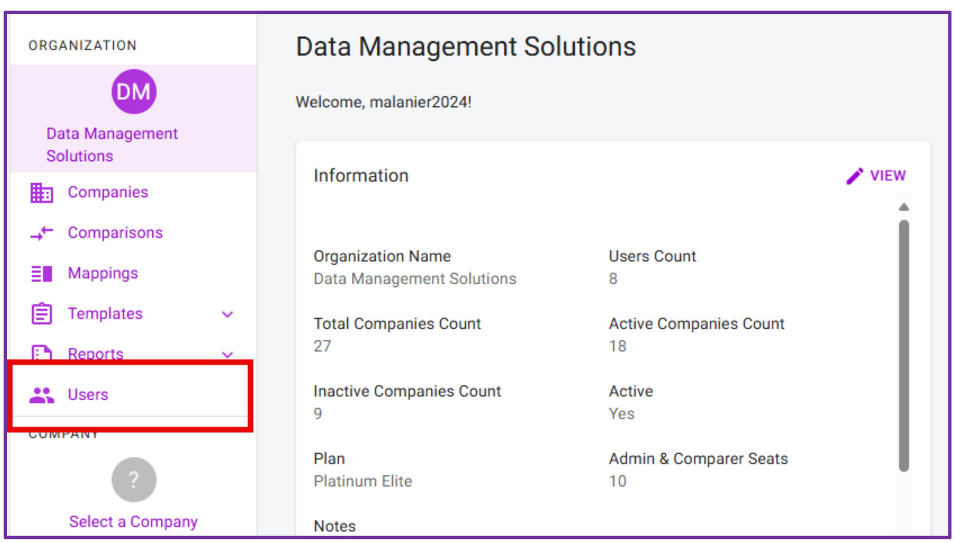
Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

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

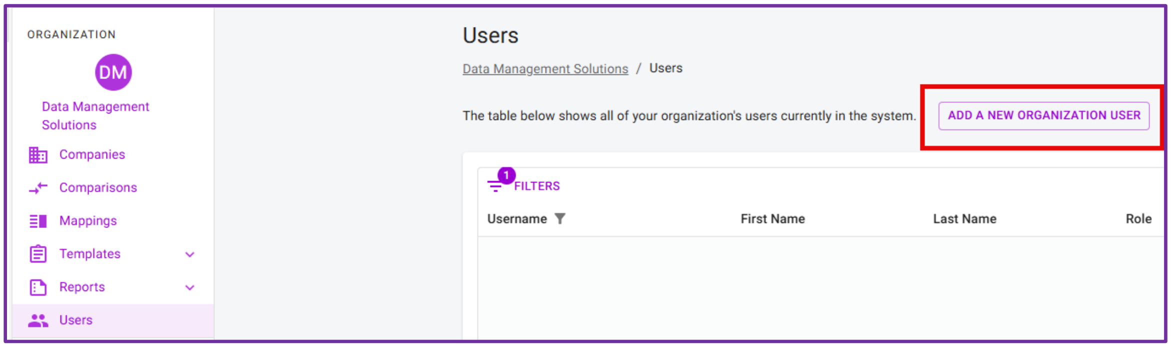
Note: This user type does not count against your licensed user seats. You may create an unlimited number of Task Managers.

Adding an Organization Verifier user

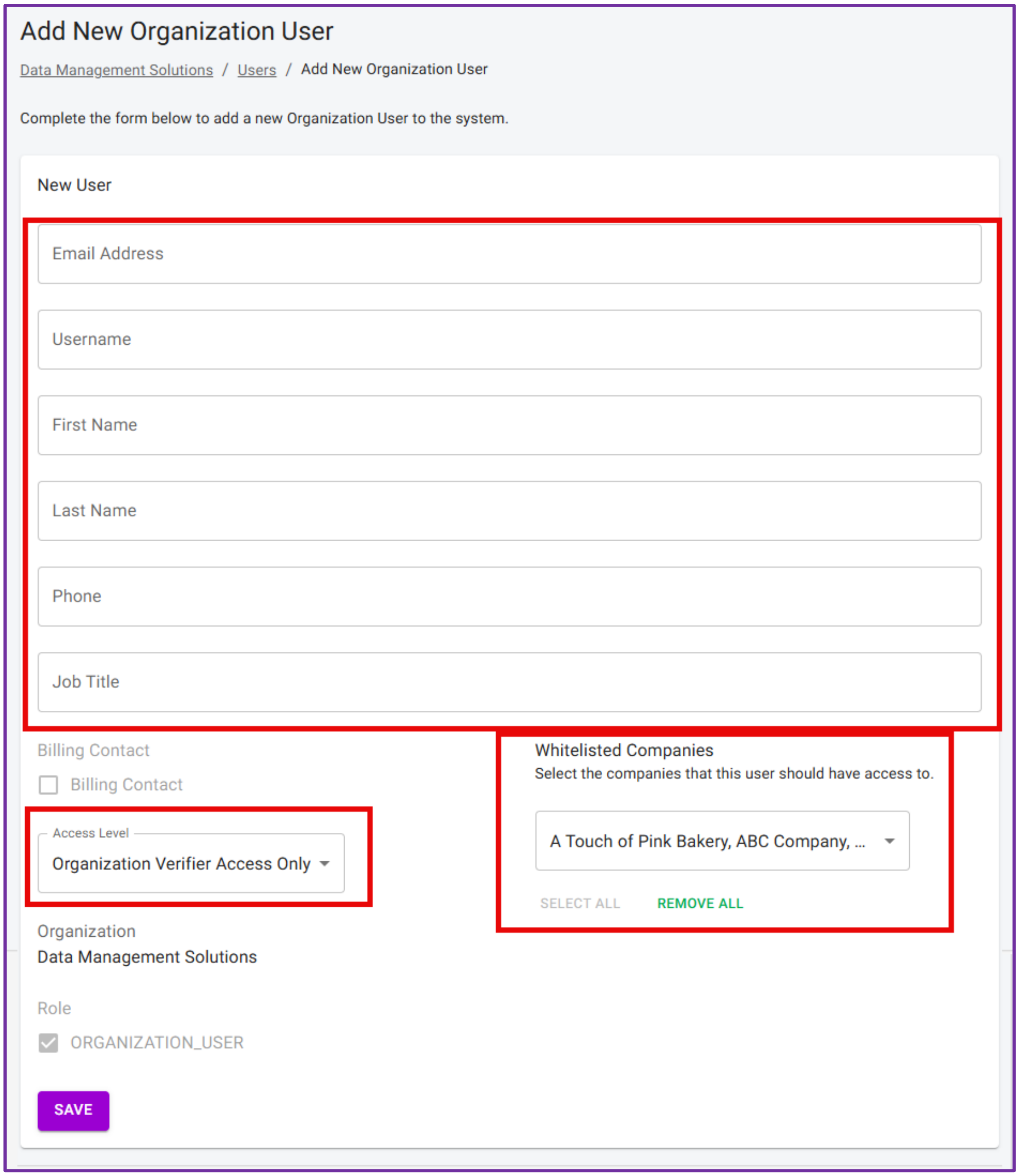
Select USERS under the desired organization.



Select ADD A NEW ORGANIZATION USER.



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



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.

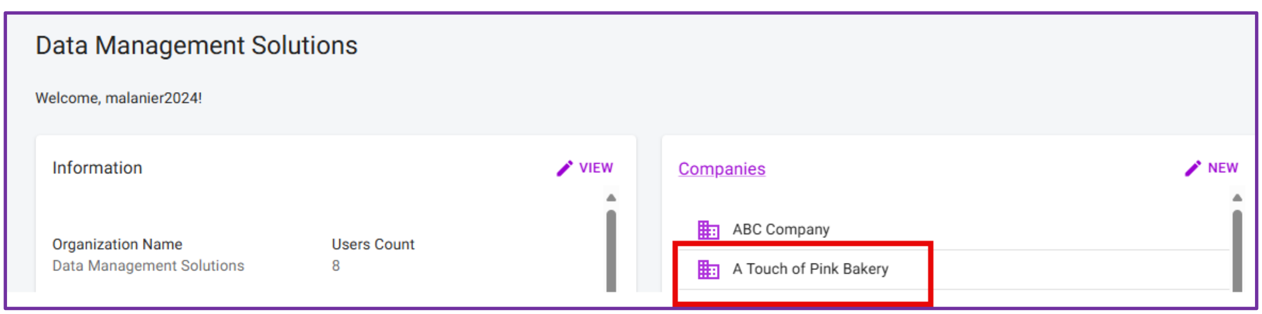
Once all applicable information has been entered and whitelisted companies selected/deselected, click Save.

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

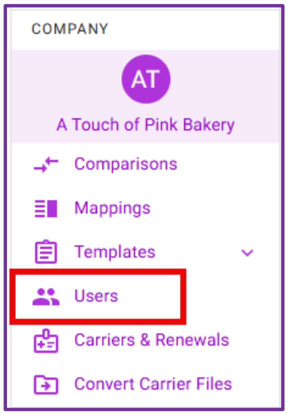
Note: This user type does not count against your licensed user seats. You may create an unlimited number of Organization Verifiers.

Adding a Company Admin user

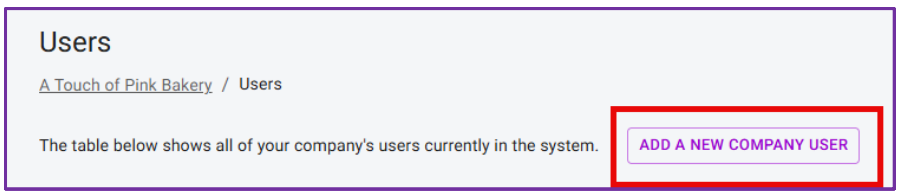
Select the Company where the new user will be added.



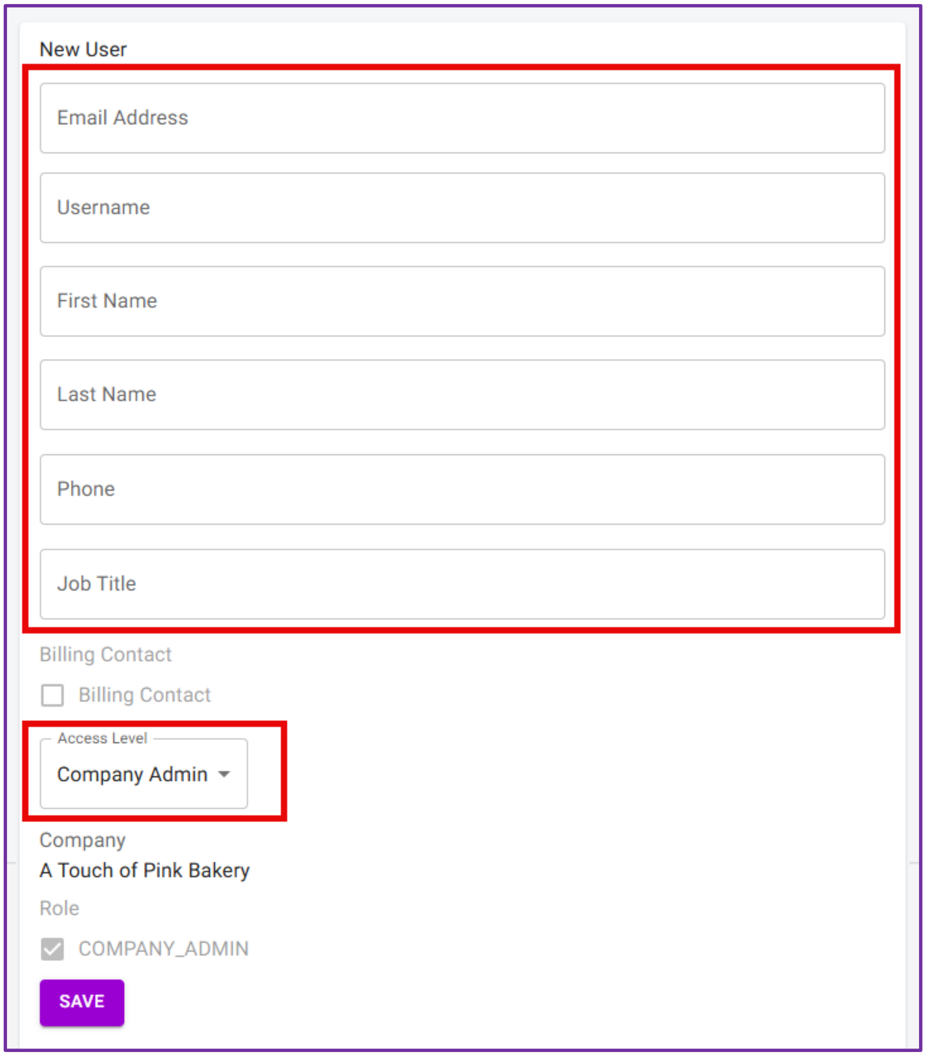
Click USERS under the desired company.



Click ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user.



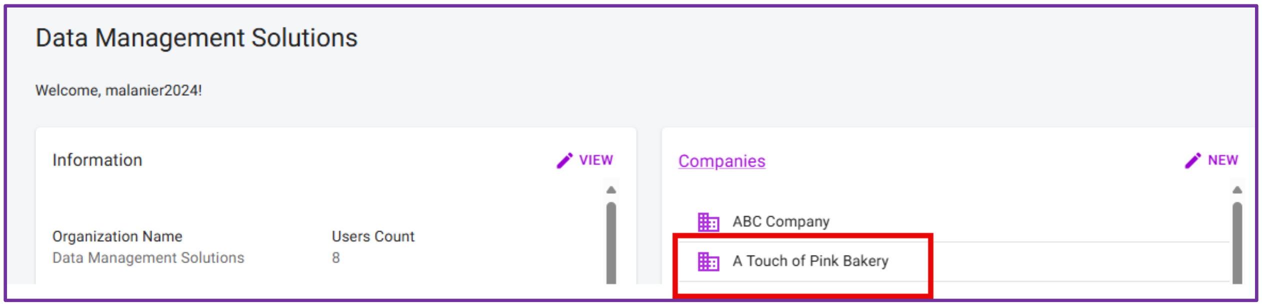
In the Access Level dropdown, select the user type: Company Admin. This access level has full compare and merge functionality for the specific company that the user was created under.

Once all applicable information has been entered click Save.

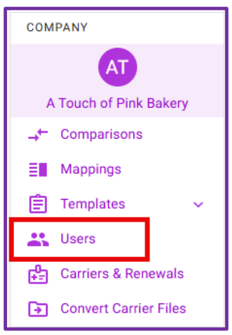
The user will then receive an auto-generated email with a temporary password and a link to register their account.

Adding a Company Verifier user

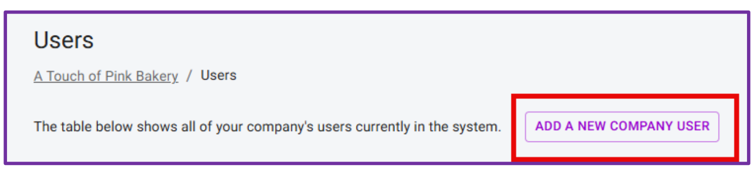
Select the Company where the new user will be added.



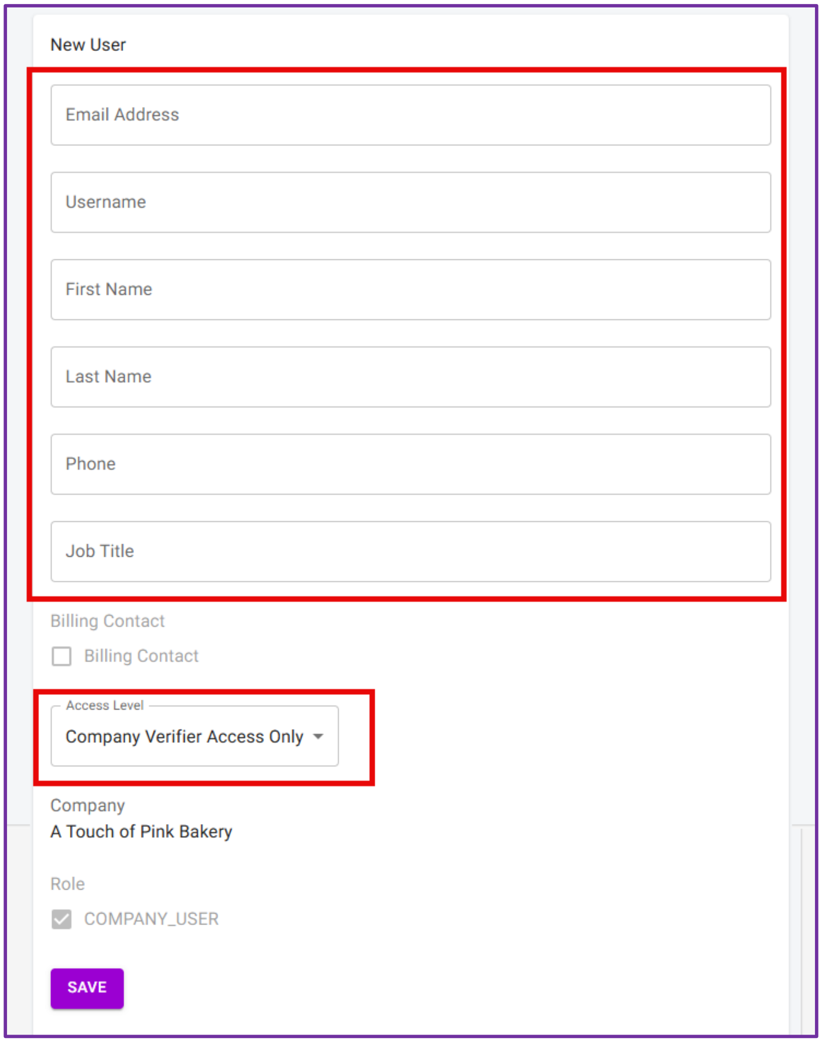
Click USERS under the desired company.



Click ADD A NEW COMPANY USER.



Enter all applicable information for the newly created user.



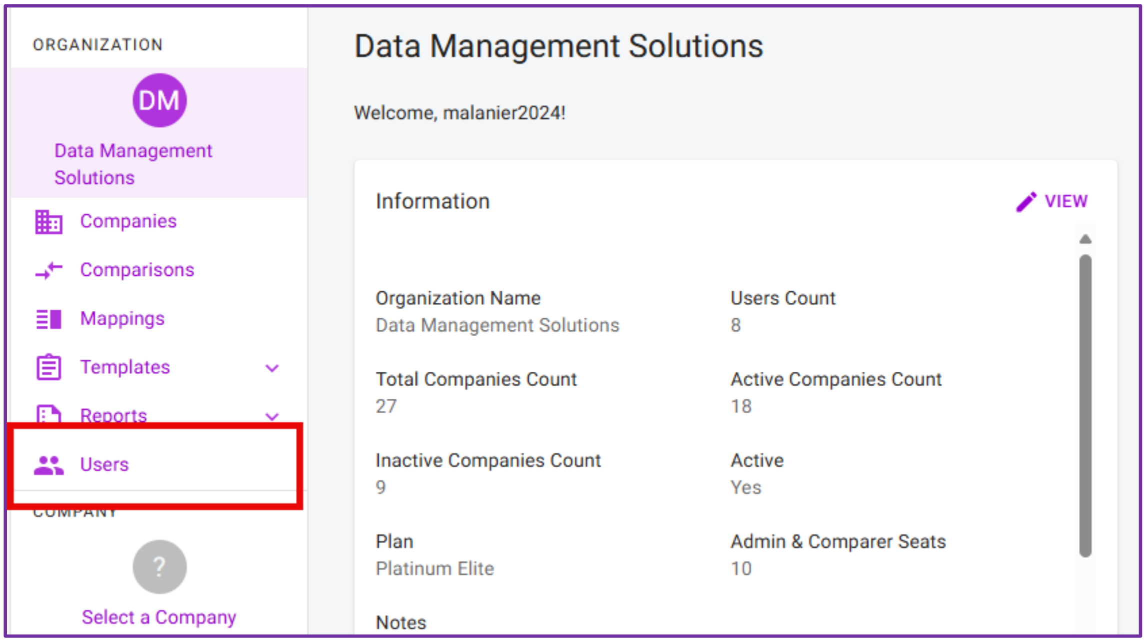
Once all applicable information has been entered click Save. Whitelisted functionality is not available as the user is limited to the company they were created under.

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

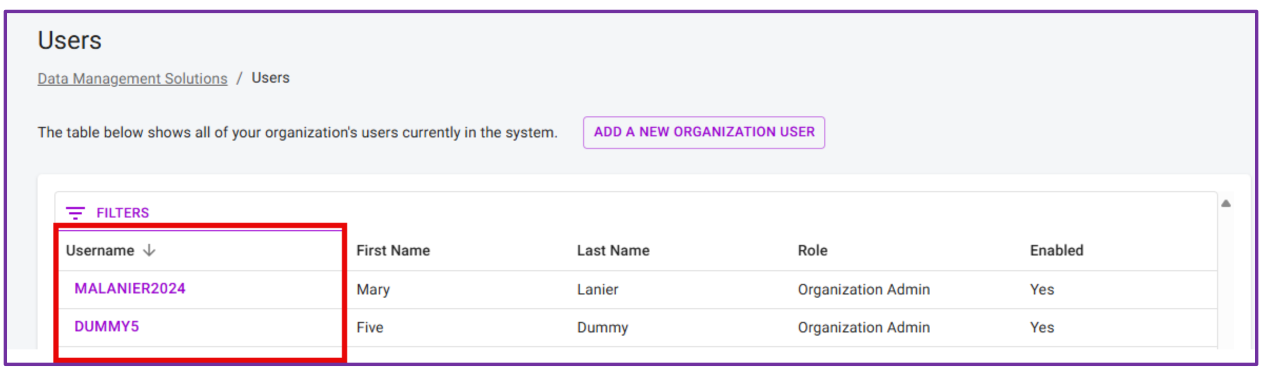
Note: This user type does not count against your licensed user seats. You may create an unlimited number of Company Verifiers.

Inactivating / Reactivating a User

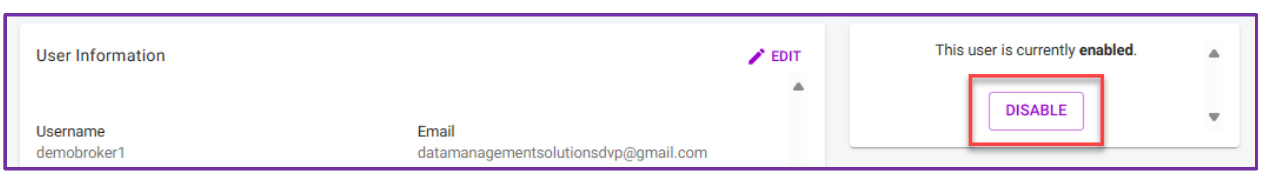
Select USERS under the organization.



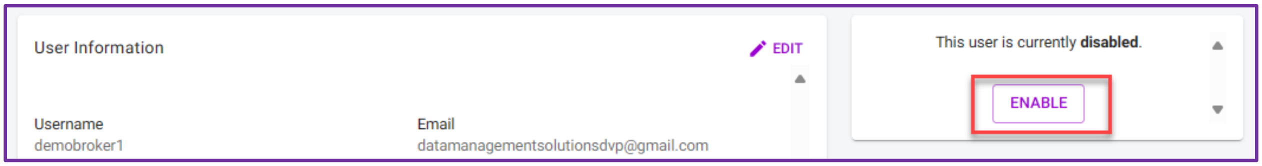
Select User to inactivate.



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



To reverse the inactivation, click ENABLE.

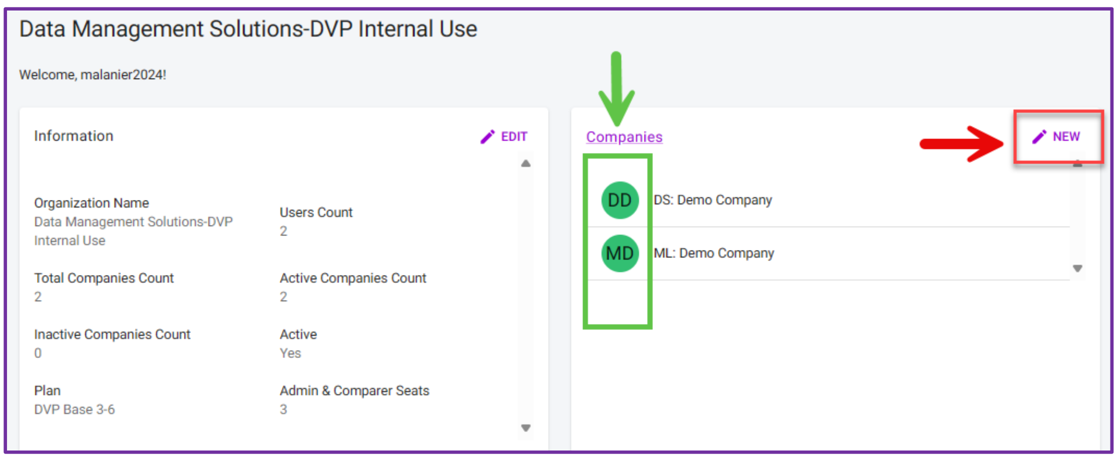


Create the **Compare Only**

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.

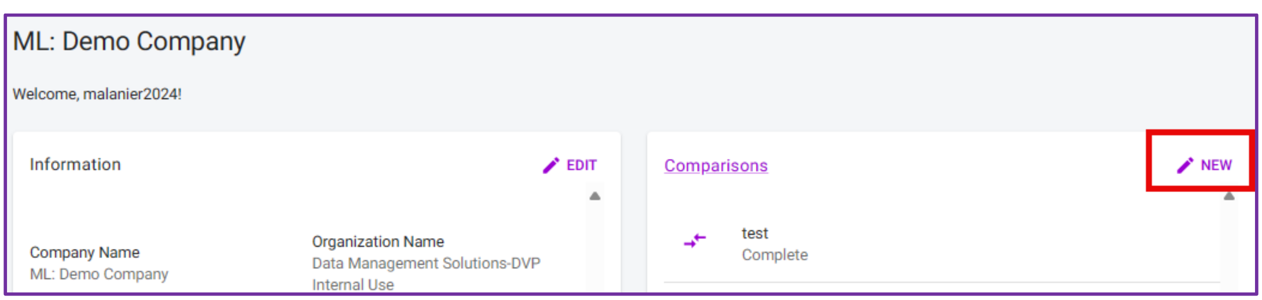
Select the Company

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



Create New Compare

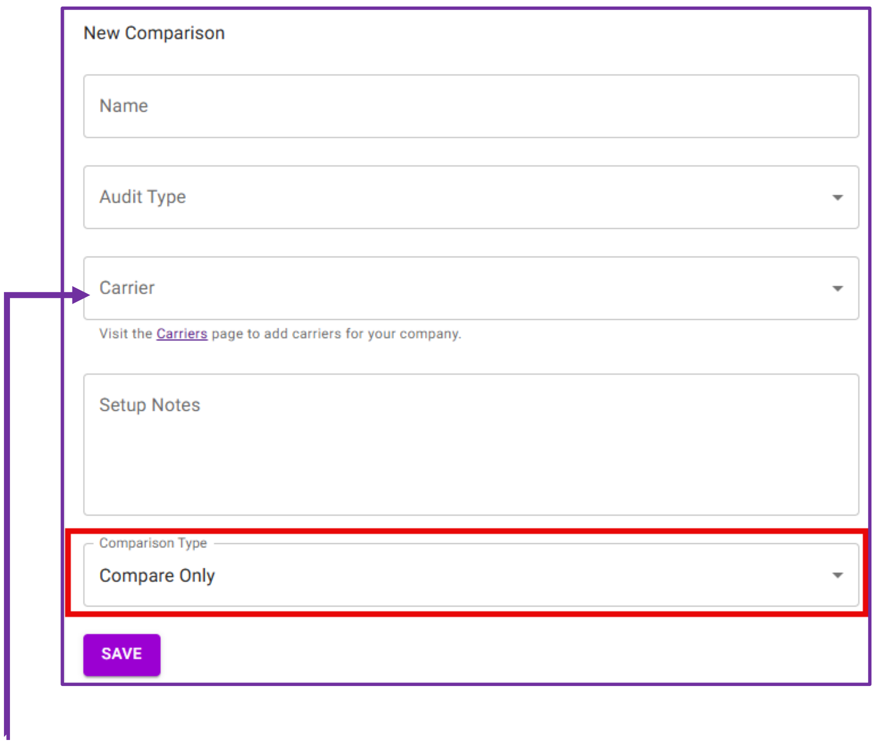
Select NEW to begin a new comparison



Name the Compare

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

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



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

Import Files

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

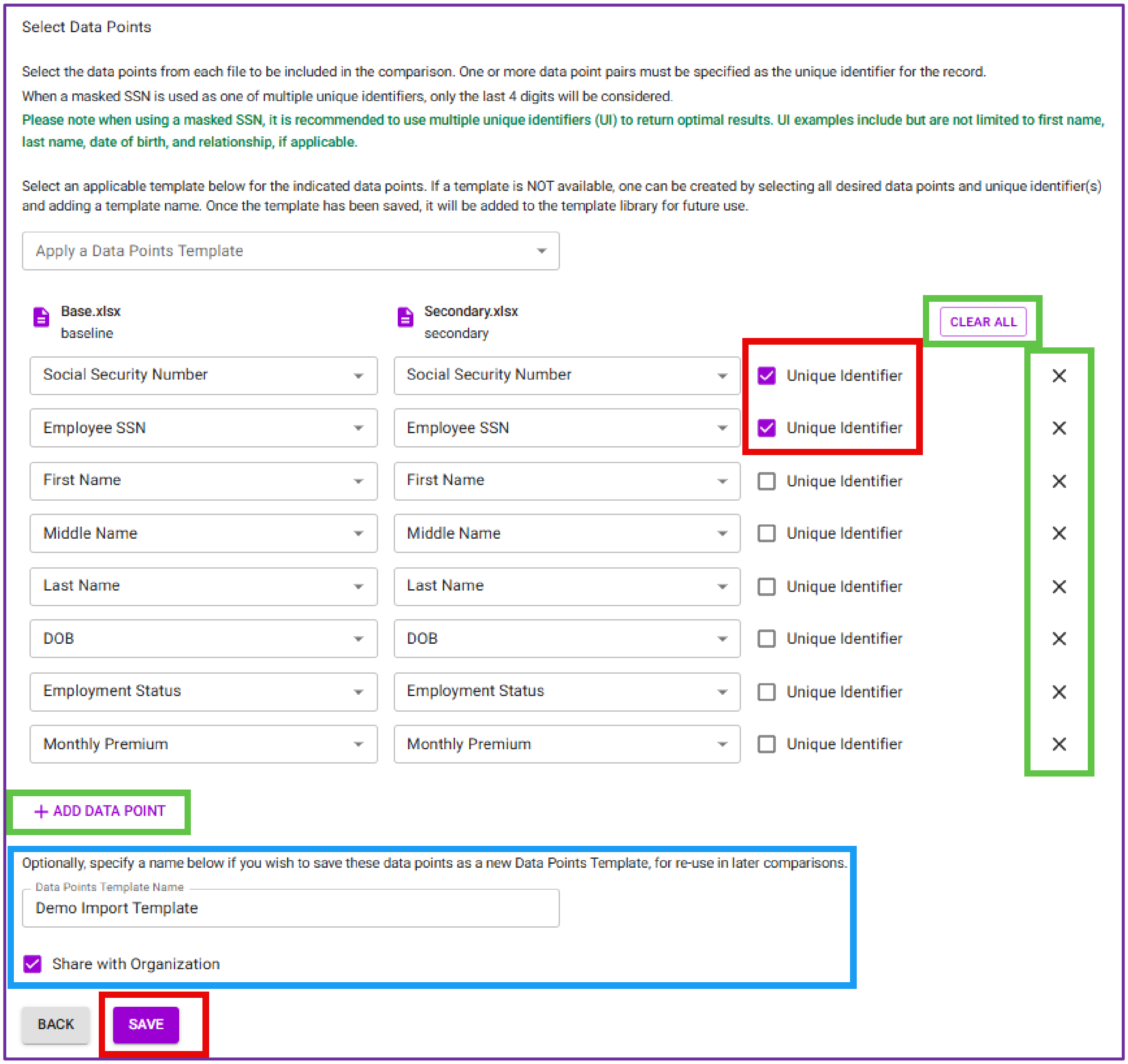
Select Data Points & Create Import Template

Matching data points will be auto 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.

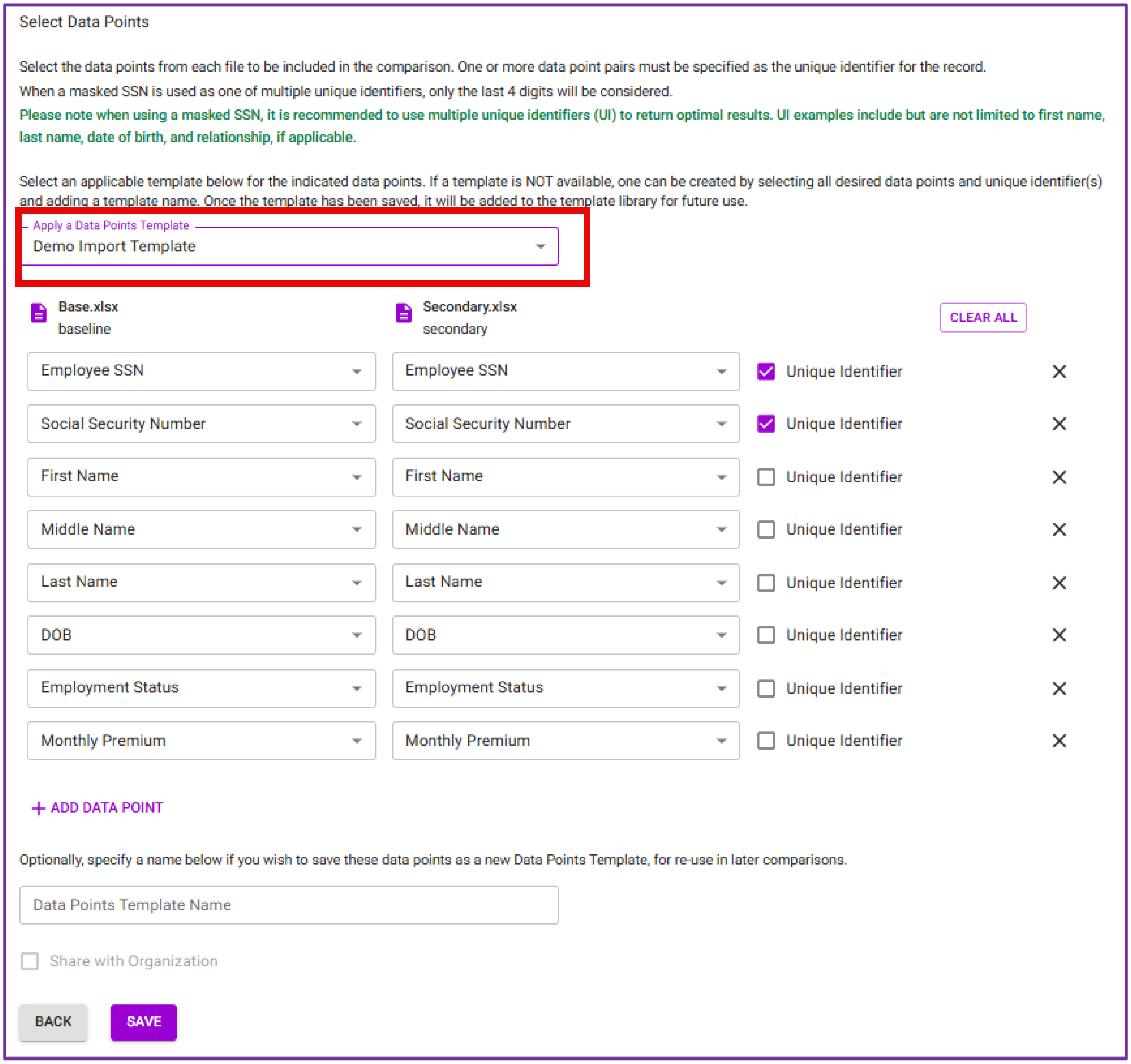
Once all desired data points and unique identifiers have been selected, you can save the configuration for future use by entering a **Template Name** and clicking **SAVE**.



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.

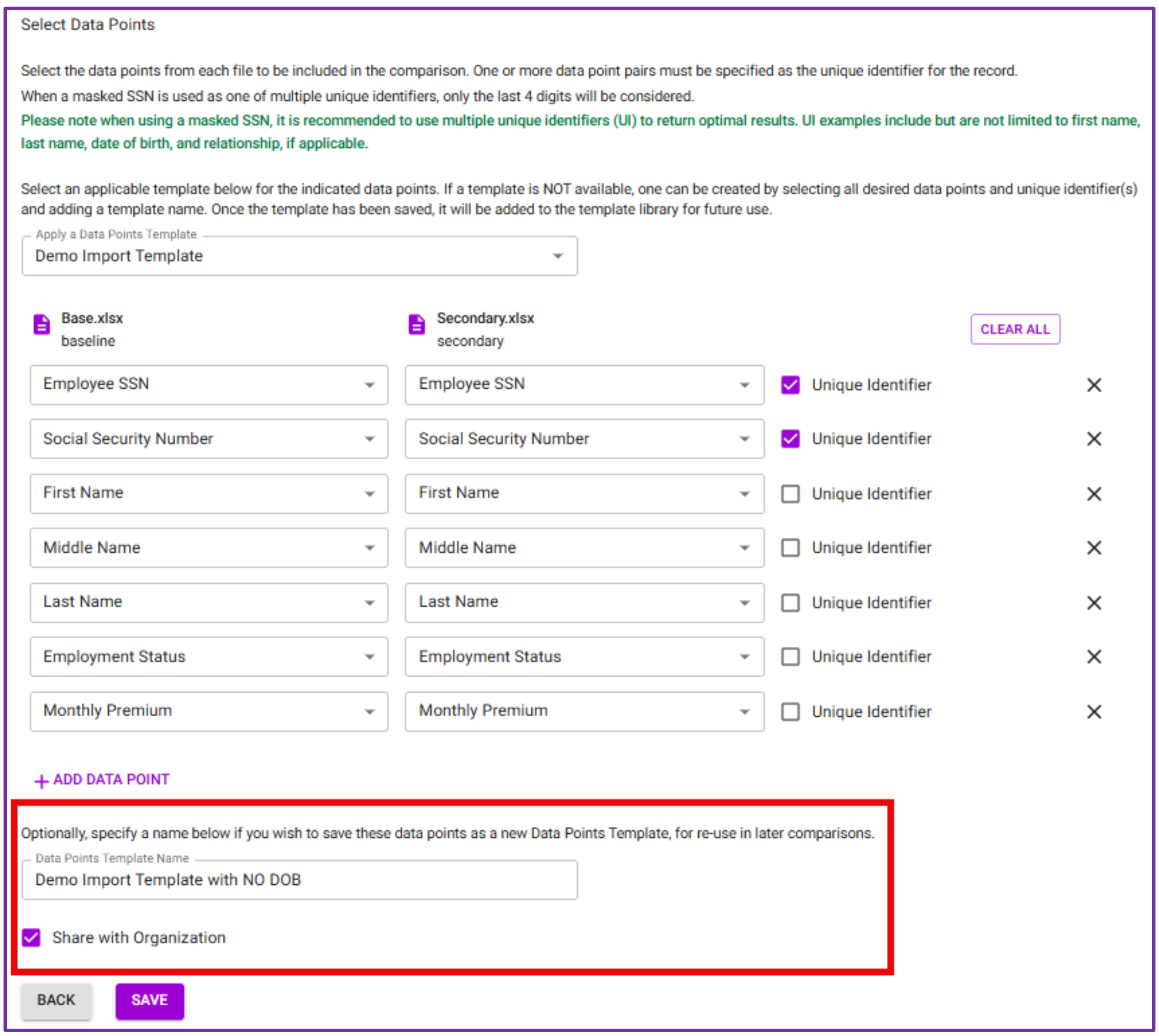
If no template is available, you can create one by selecting the desired data points and unique identifier(s), then entering a template name. Once saved, the template will be added to your library for future use and can optionally be shared with the organization for use across other companies.



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.

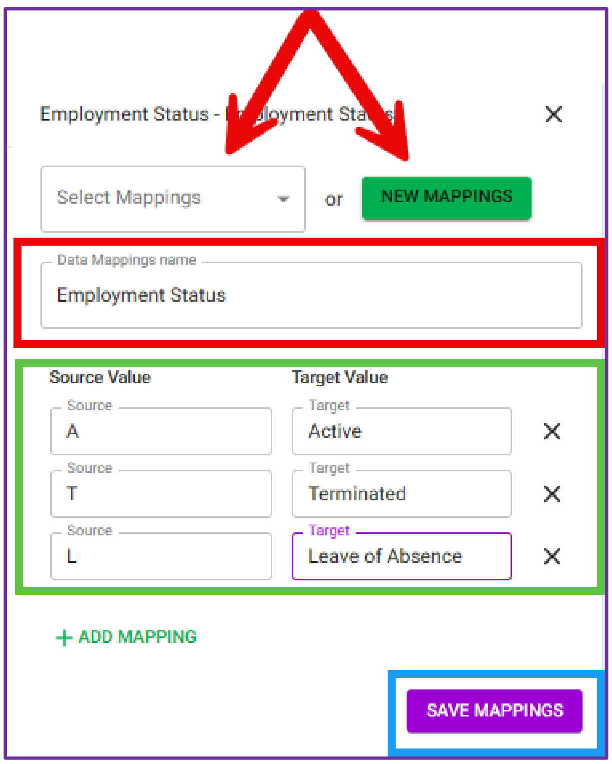


Mapping

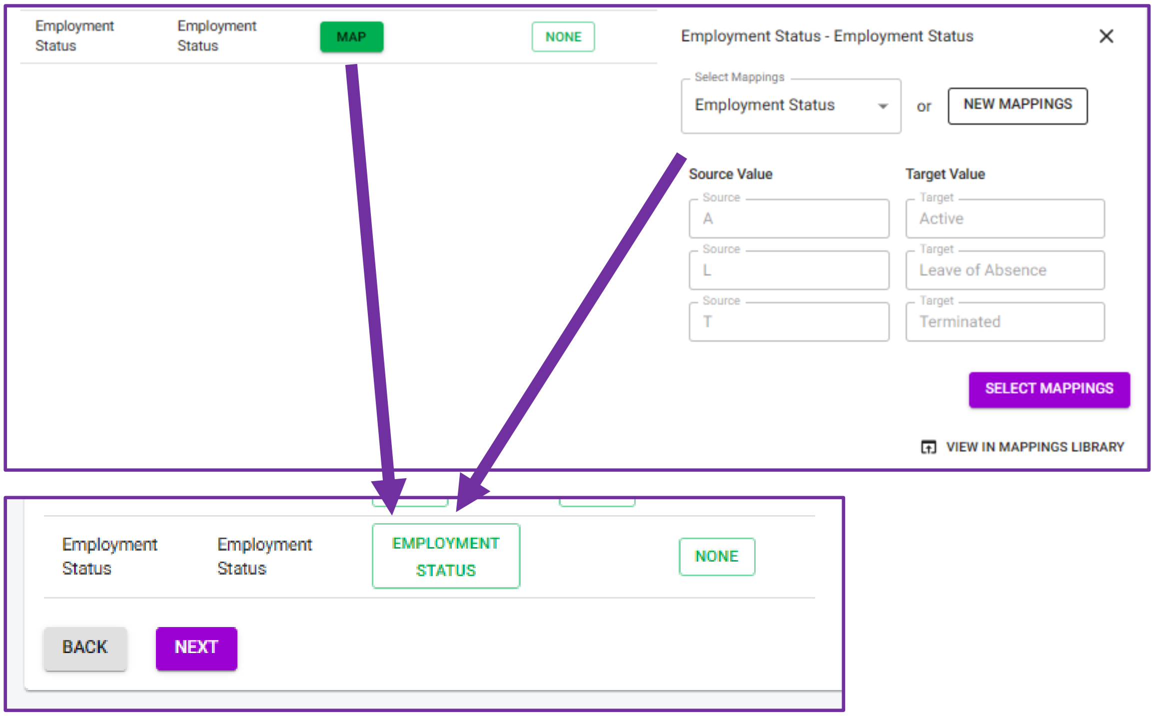
Add customized mapping for data such as plans, tiers, or departments by utilizing the MAP buttons. Existing mappings for the company or created and shared at the Organization level can be re-used or new mappings can be created.

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.

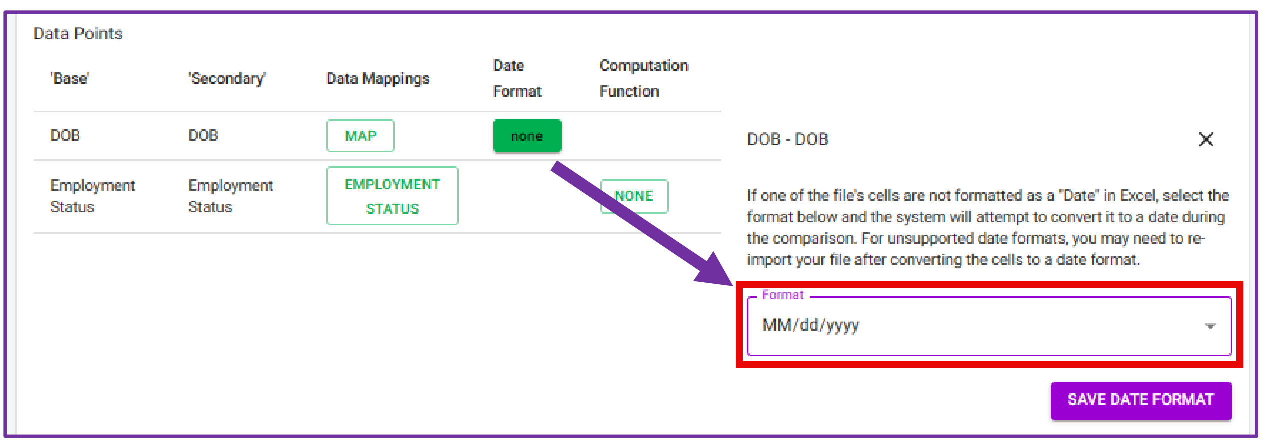
Click SAVE MAPPINGS to newly created mapping to save.



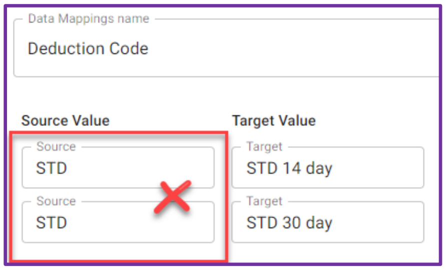
If you use existing mapping, click SELECT MAPPINGS.

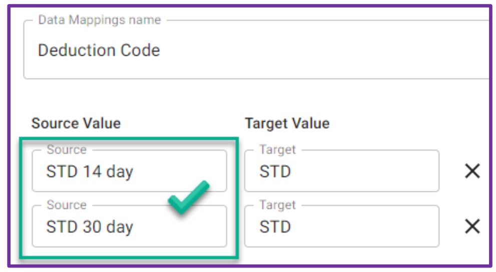


If the date is not formatted in the files as a date, select the matching format to convert from text to date and then SAVE DATE FORMAT. If matching format is not available, the date must be corrected manually in the files and then re-imported. Click NEXT once the mapping is complete.



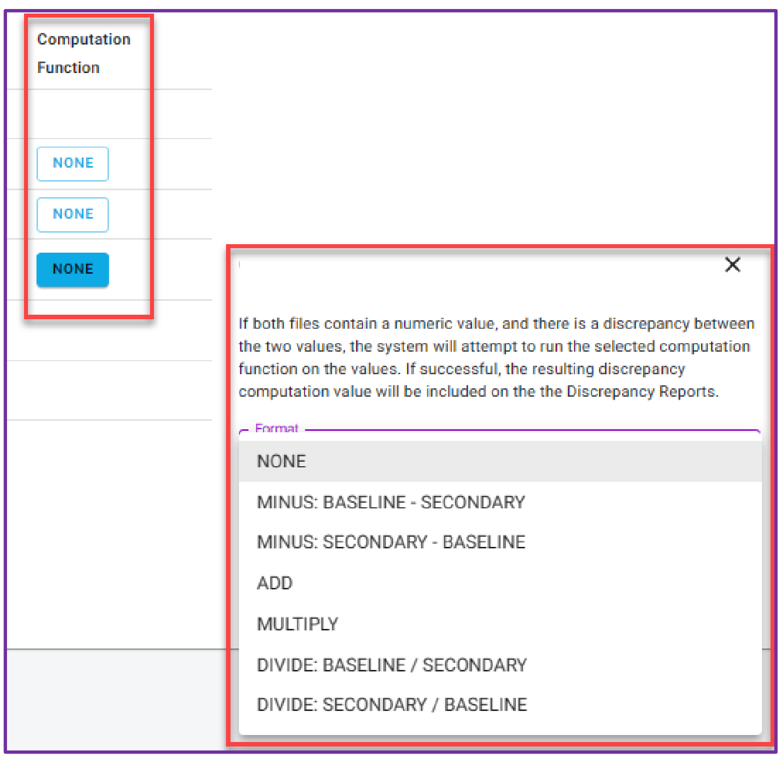
NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.



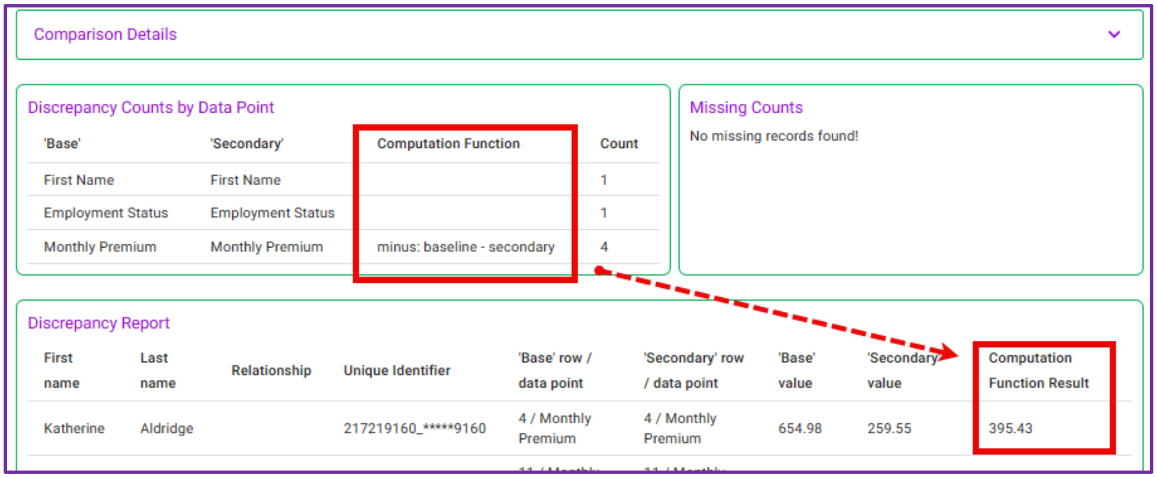


Mapping – Computation

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



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

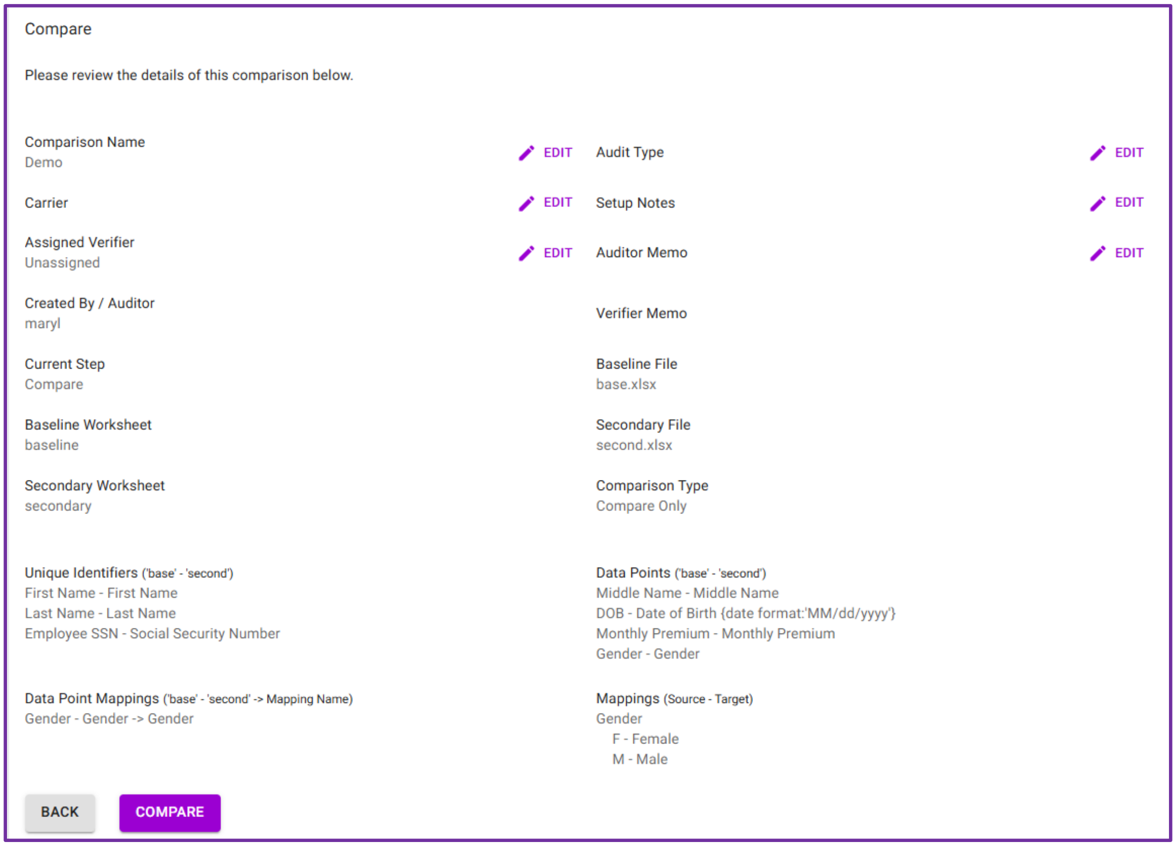


Note**:** This functionality applies **only to numeric fields**, and **only to data points that are *not* part of the unique identifier**.

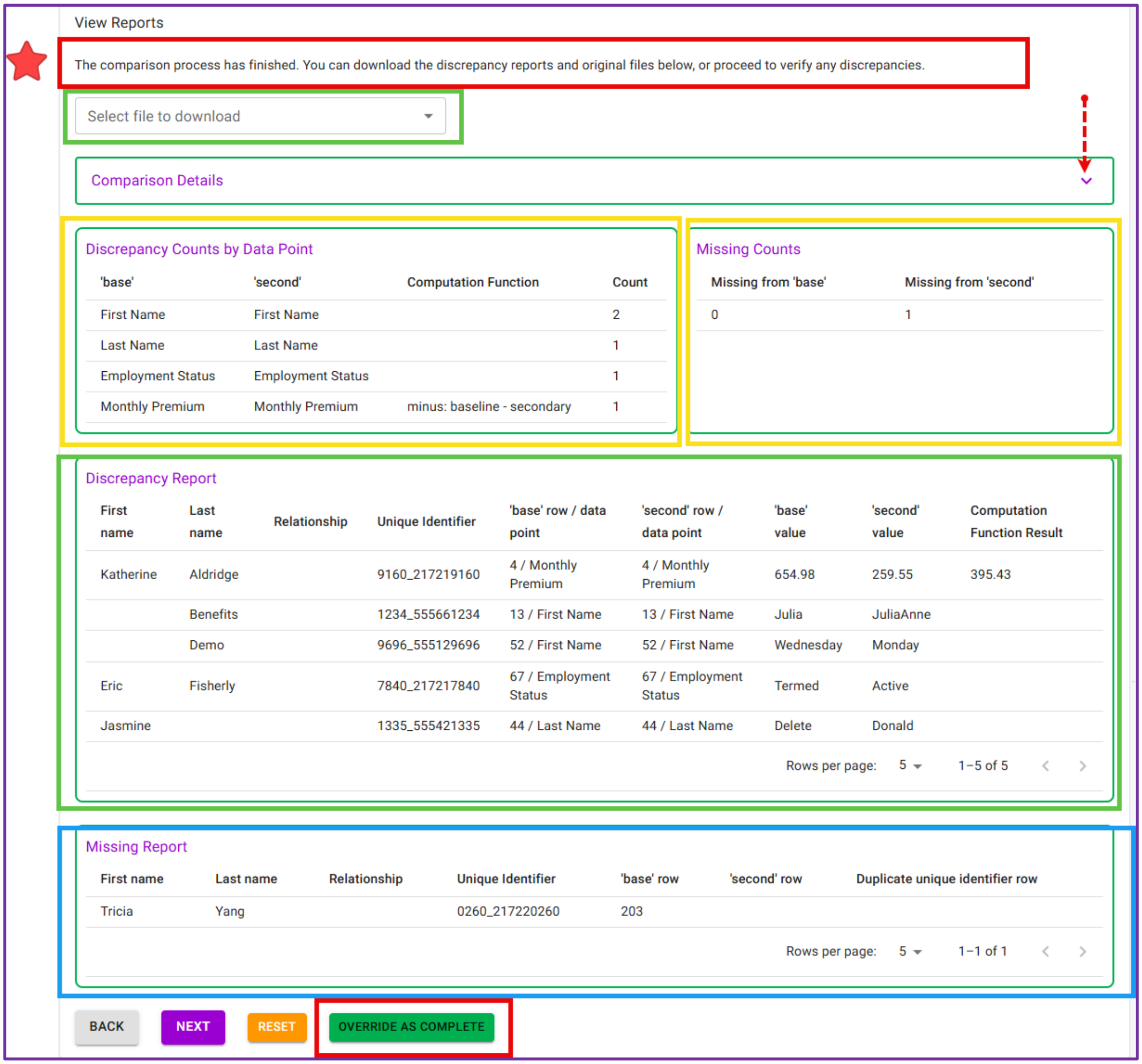
Only results from the **subtraction (minus)** function will proceed through the full compare process. All other functions will stop at **Step 5**.

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.



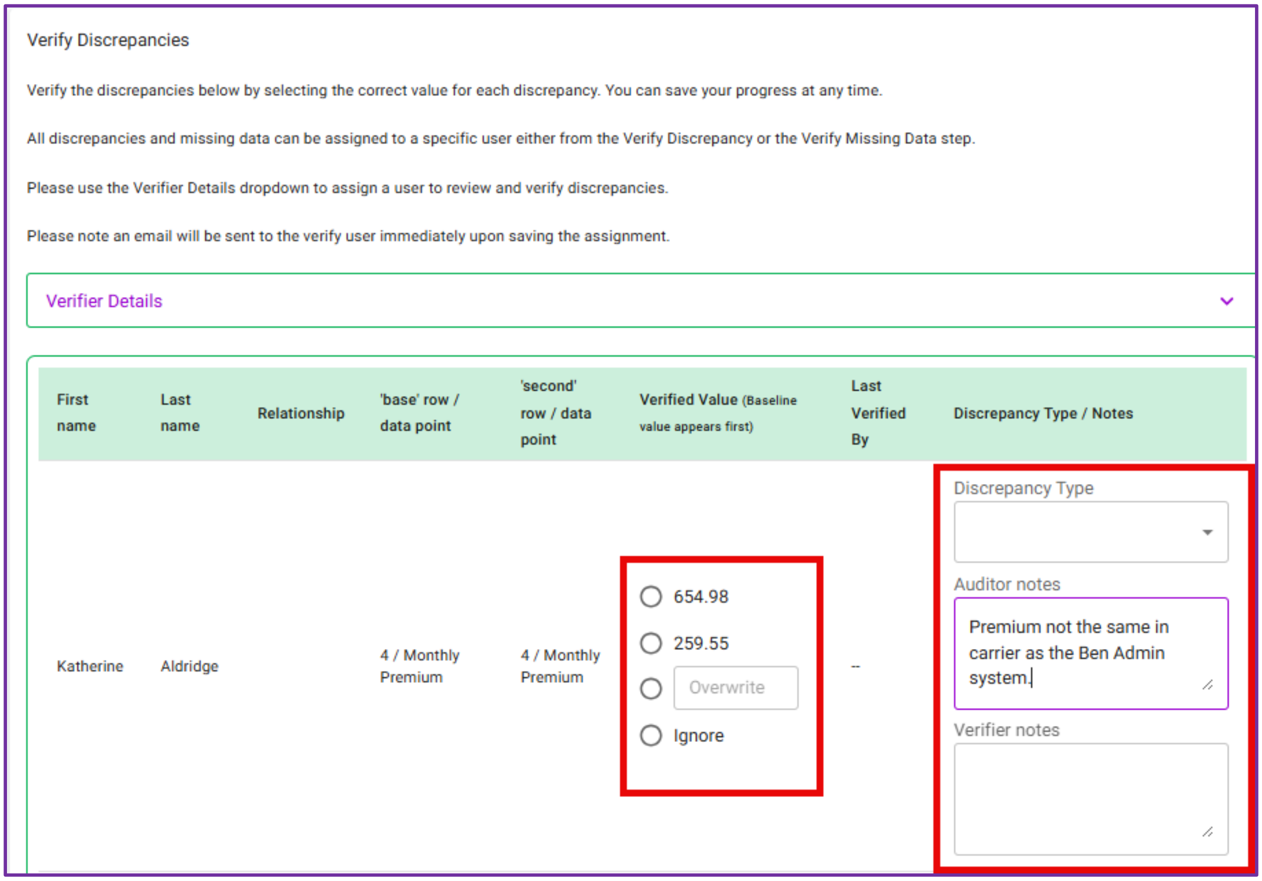
Compare is complete. Comparison results are available for view and for download by clicking the SELECT FILE TO DOWNLOAD. The original files can also be accessed from the dropdown as well as another discrepancy report where all data points are included for the row where a discrepancy was identified. If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



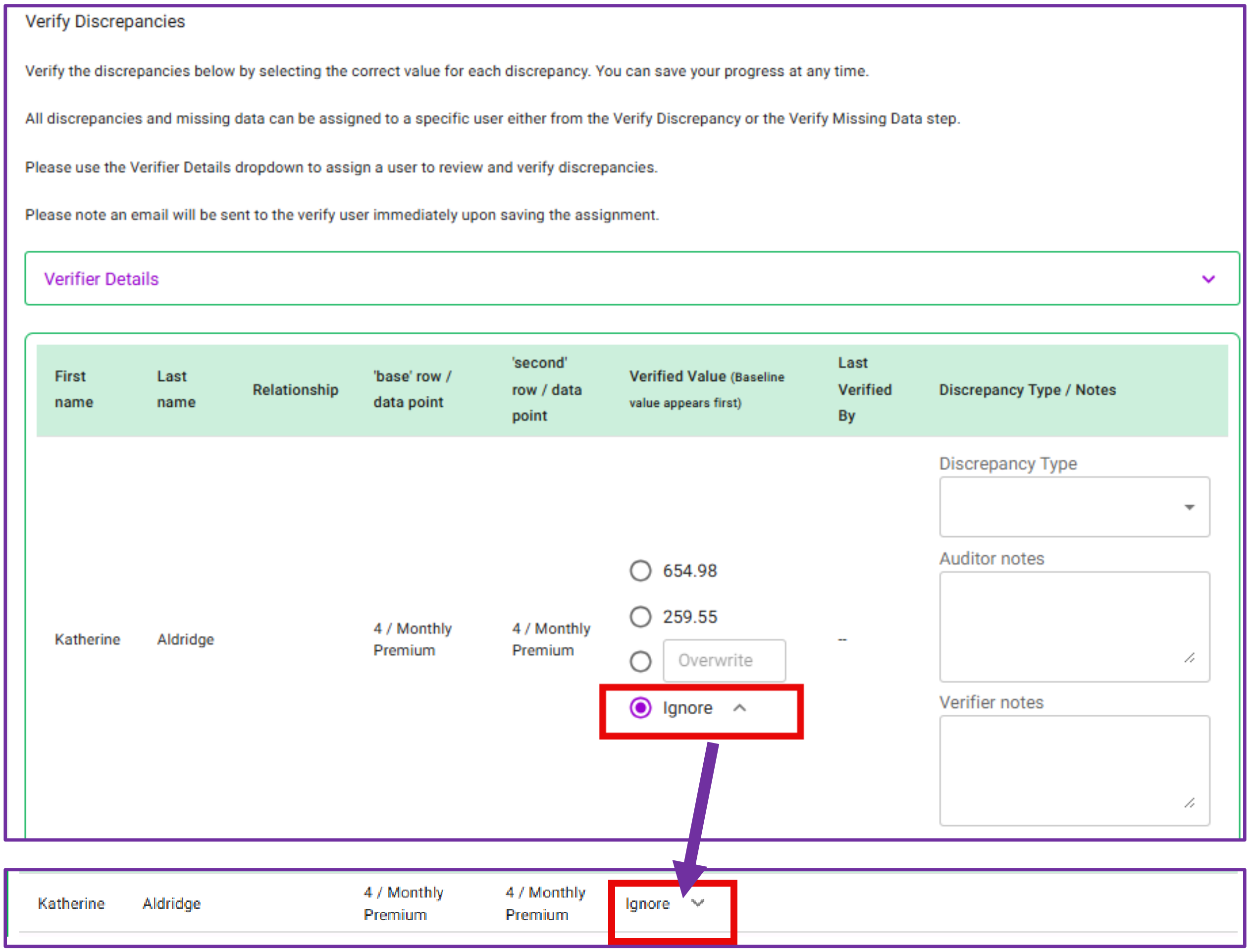
Verify Discrepancies

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

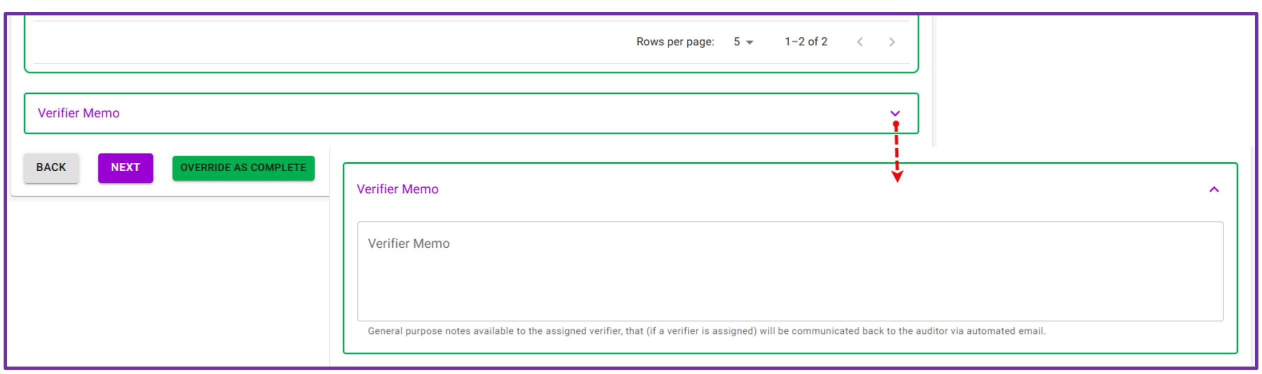
Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.



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

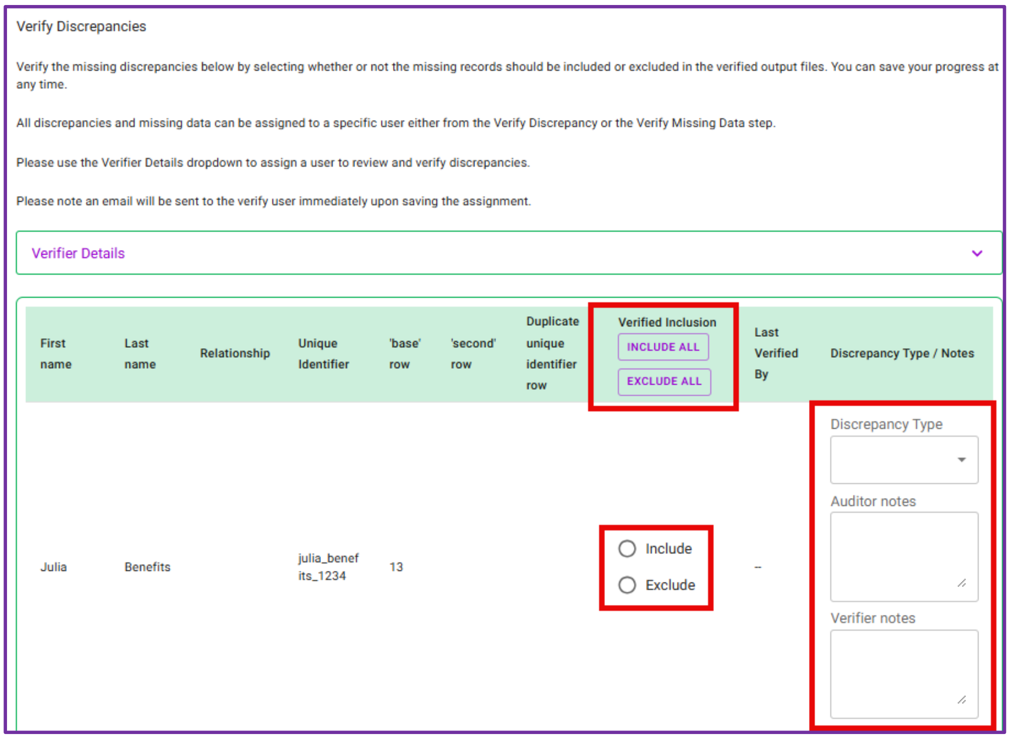


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

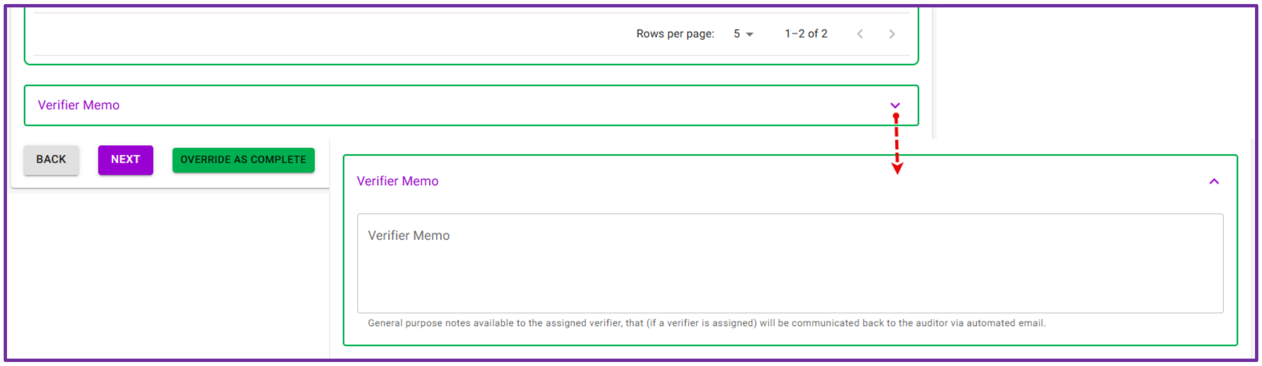


Verify Missing

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

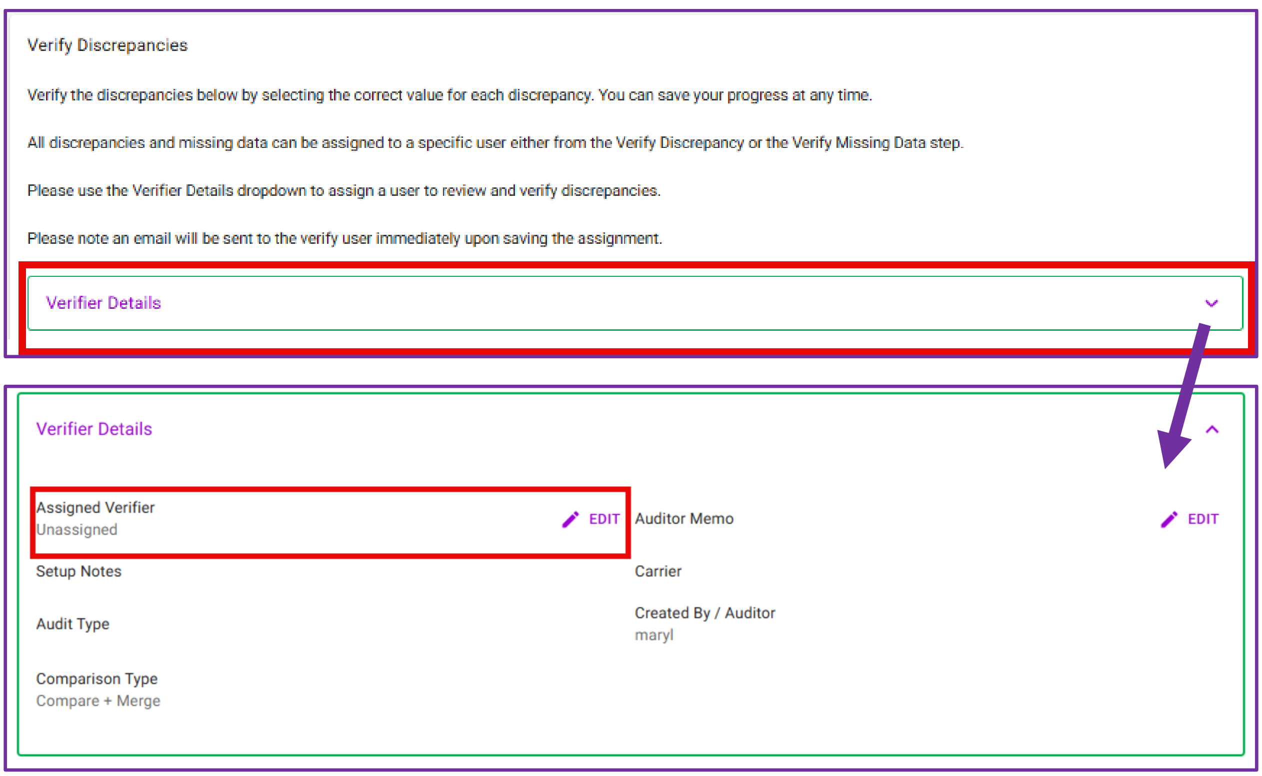


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.



Assign a Verifier to the Compare

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



This will open up the comparison edit section. In the Assigned Verifier dropdown, select an applicable user. **An audit can be assigned to anyone who has access to the specific company and only to users**

with the same level access. For example, a Company Admin user can only assign an audit to other Company Admins or Company Verifiers within the same company. An Org Level user can assign to other users within the same organization and all company level users.

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

Hello {Verifier First Name},

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

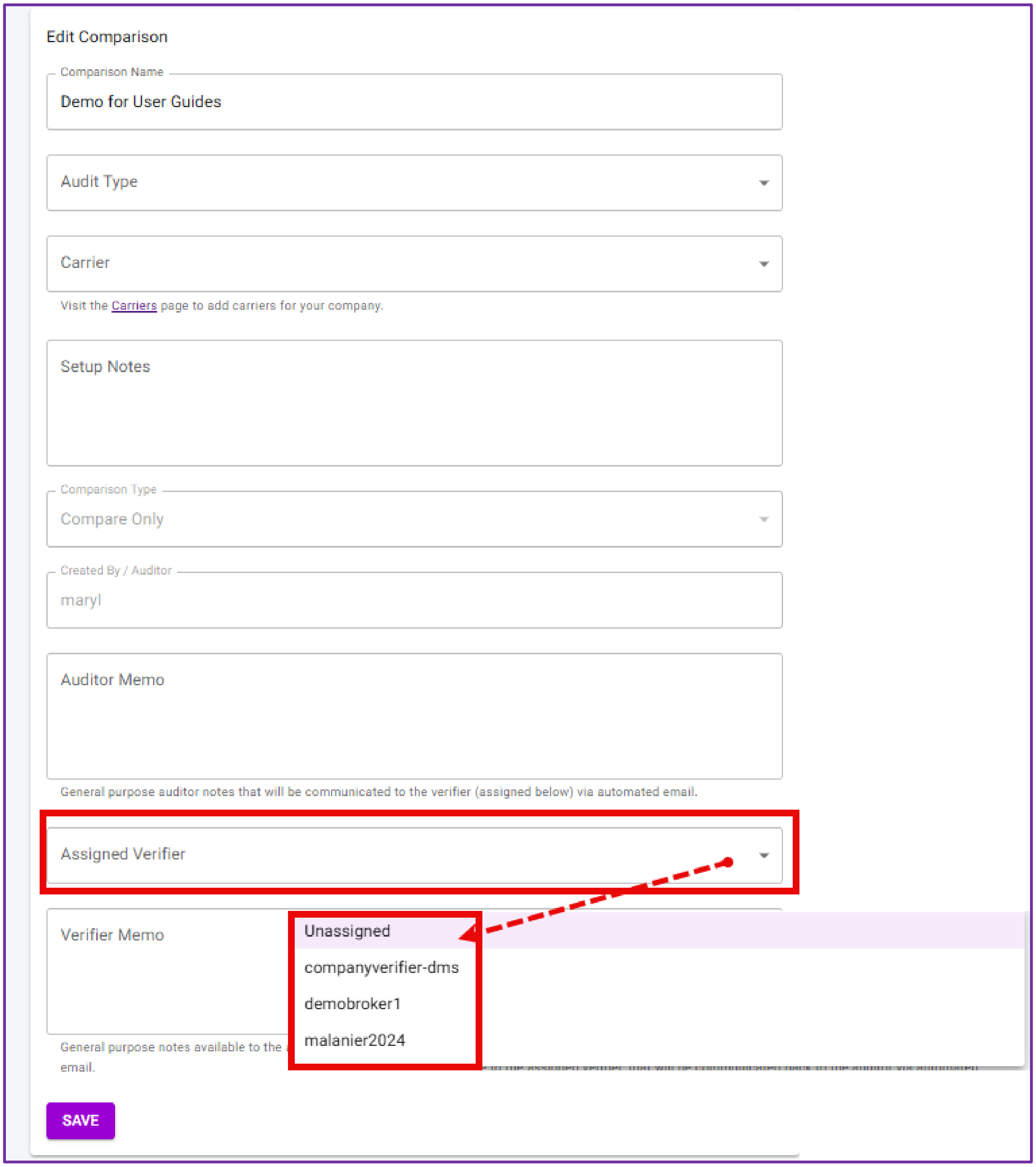
Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

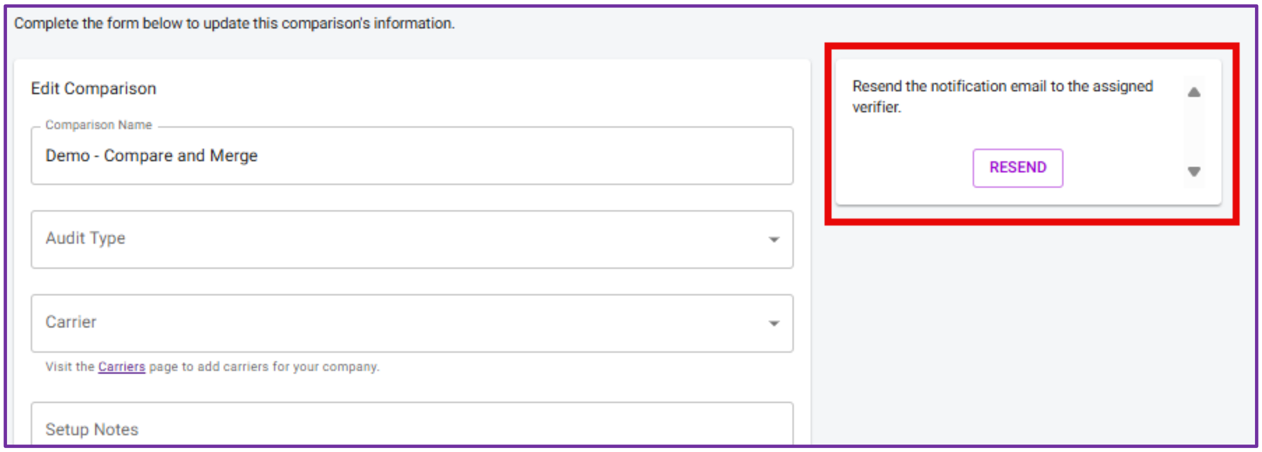
On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

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



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

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



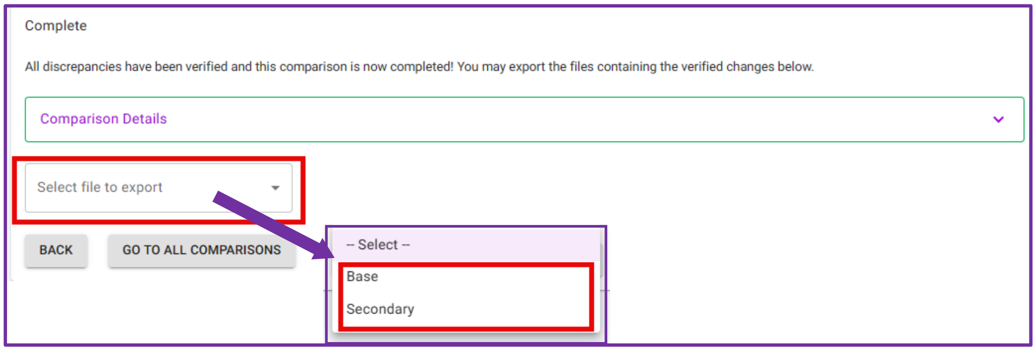
Complete the Compare

Data verification is complete.

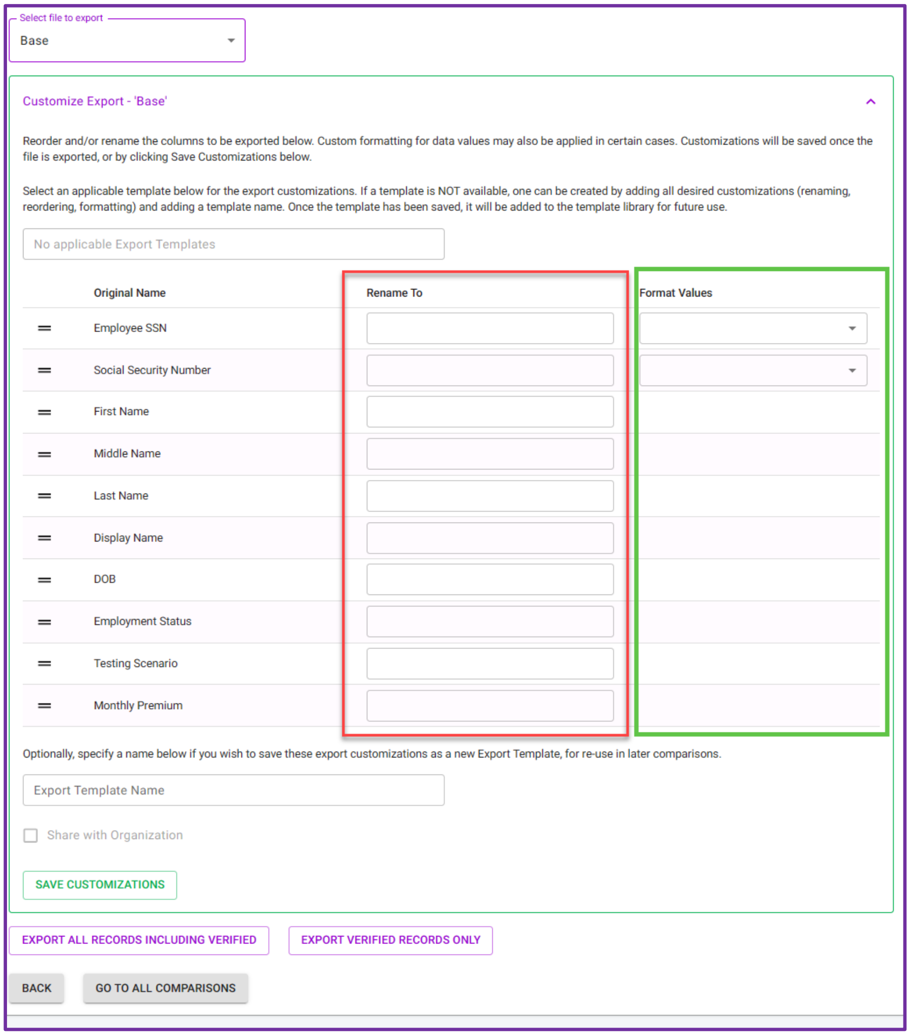
If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

> 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.

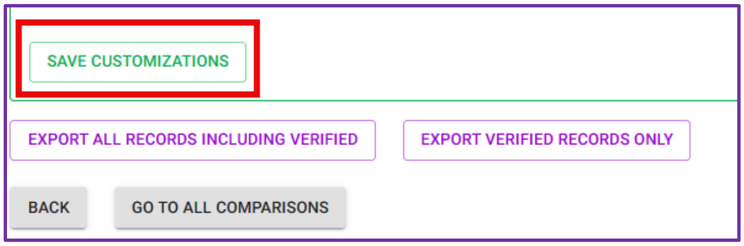


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Keys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



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

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

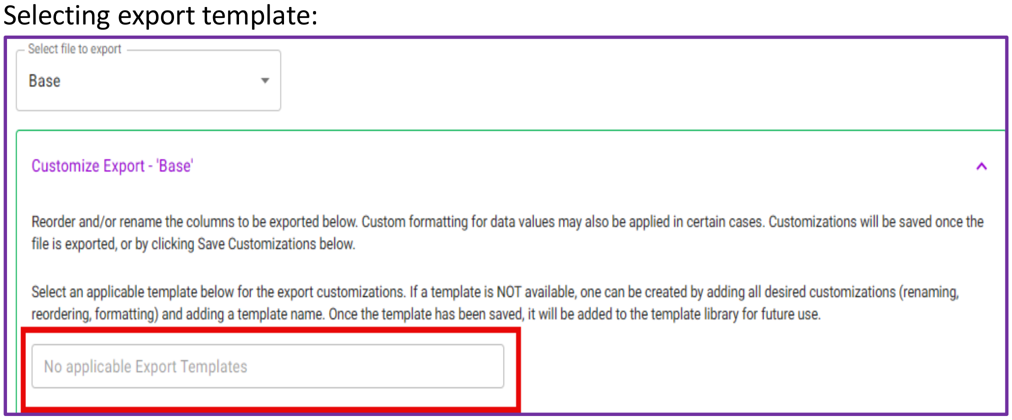


Export Template

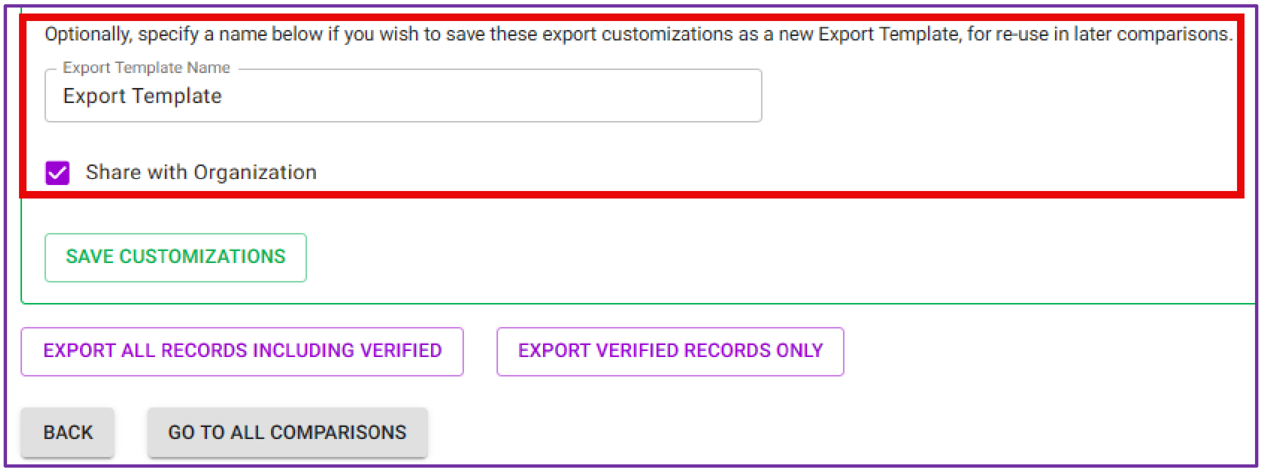
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming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

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:



Saving New Export Template:



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

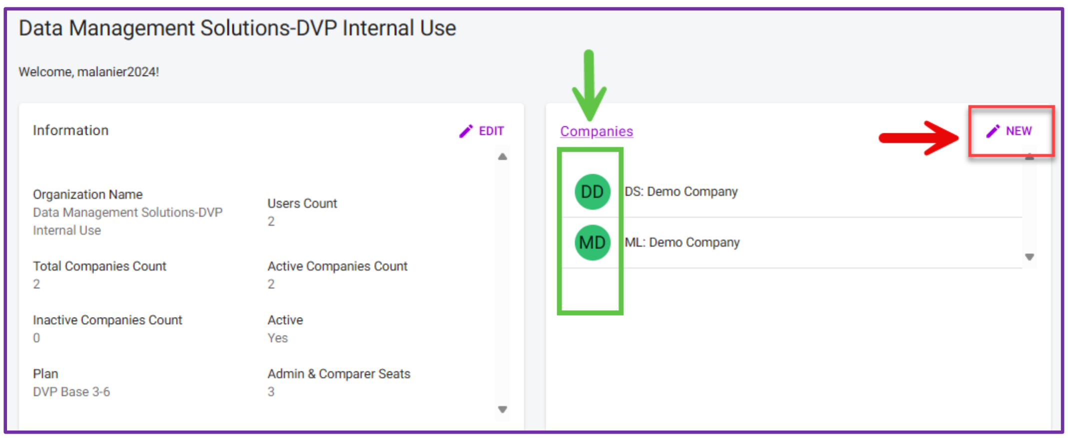
Questions: Contact Support@dms-datavalidate.com

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.

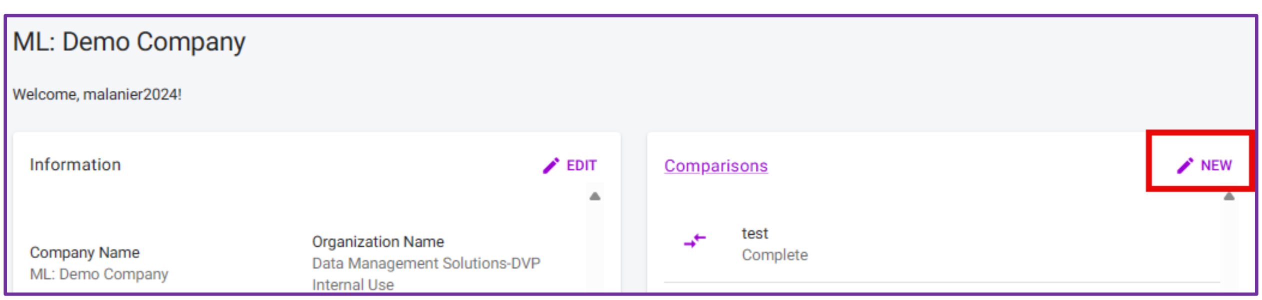
Select the Company

Select Company or click NEW to create a new company.



Create New Compare

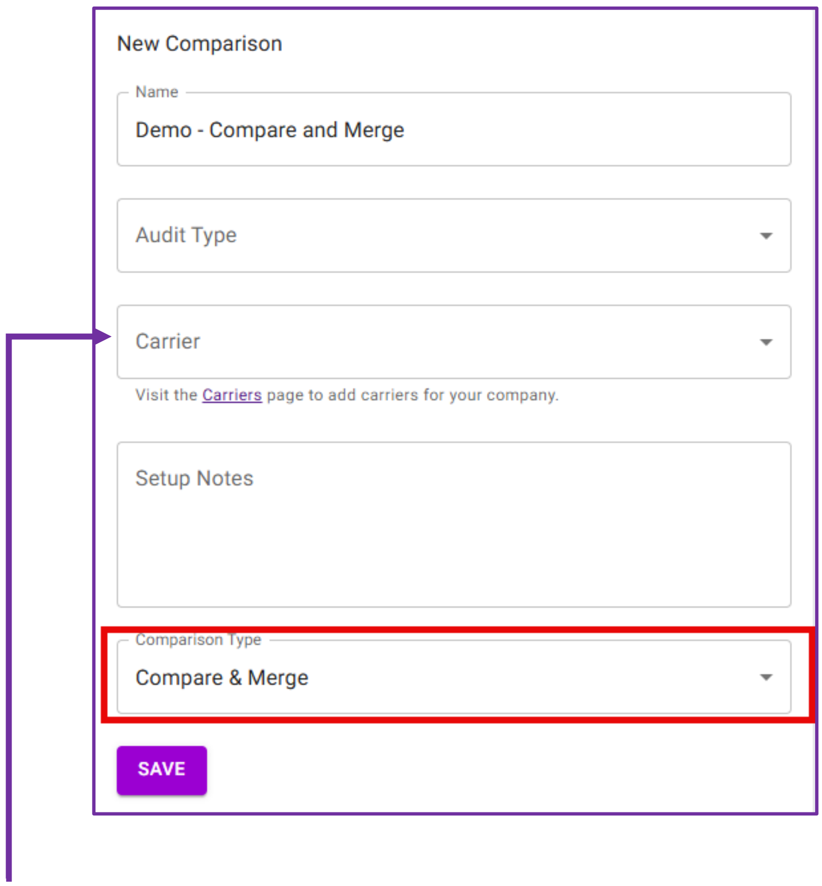
Select NEW to begin a new comparison



Name the Compare

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

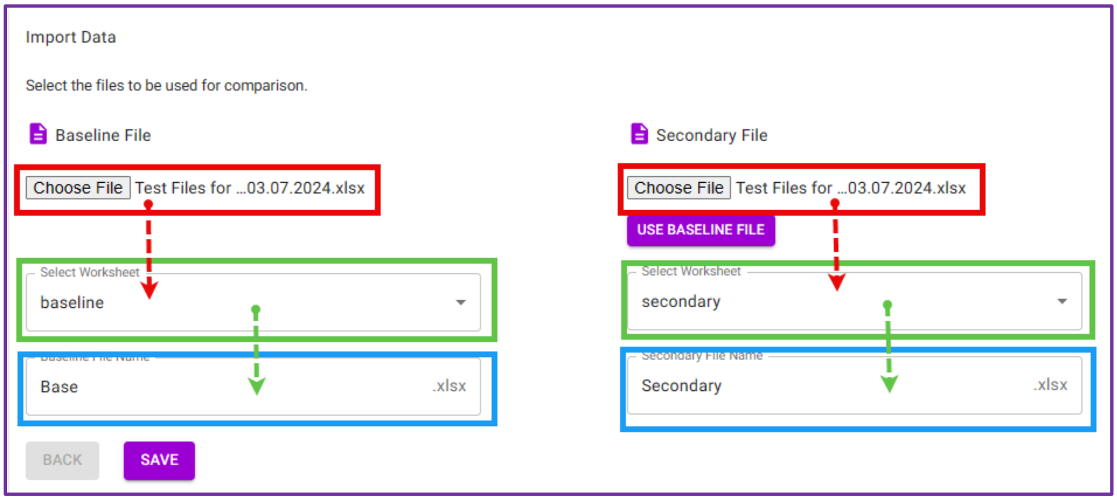
Please Note that once the comparison type is selected and saved, it cannot be changed.



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

Import Files

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



Select Data Points & Create Import Template

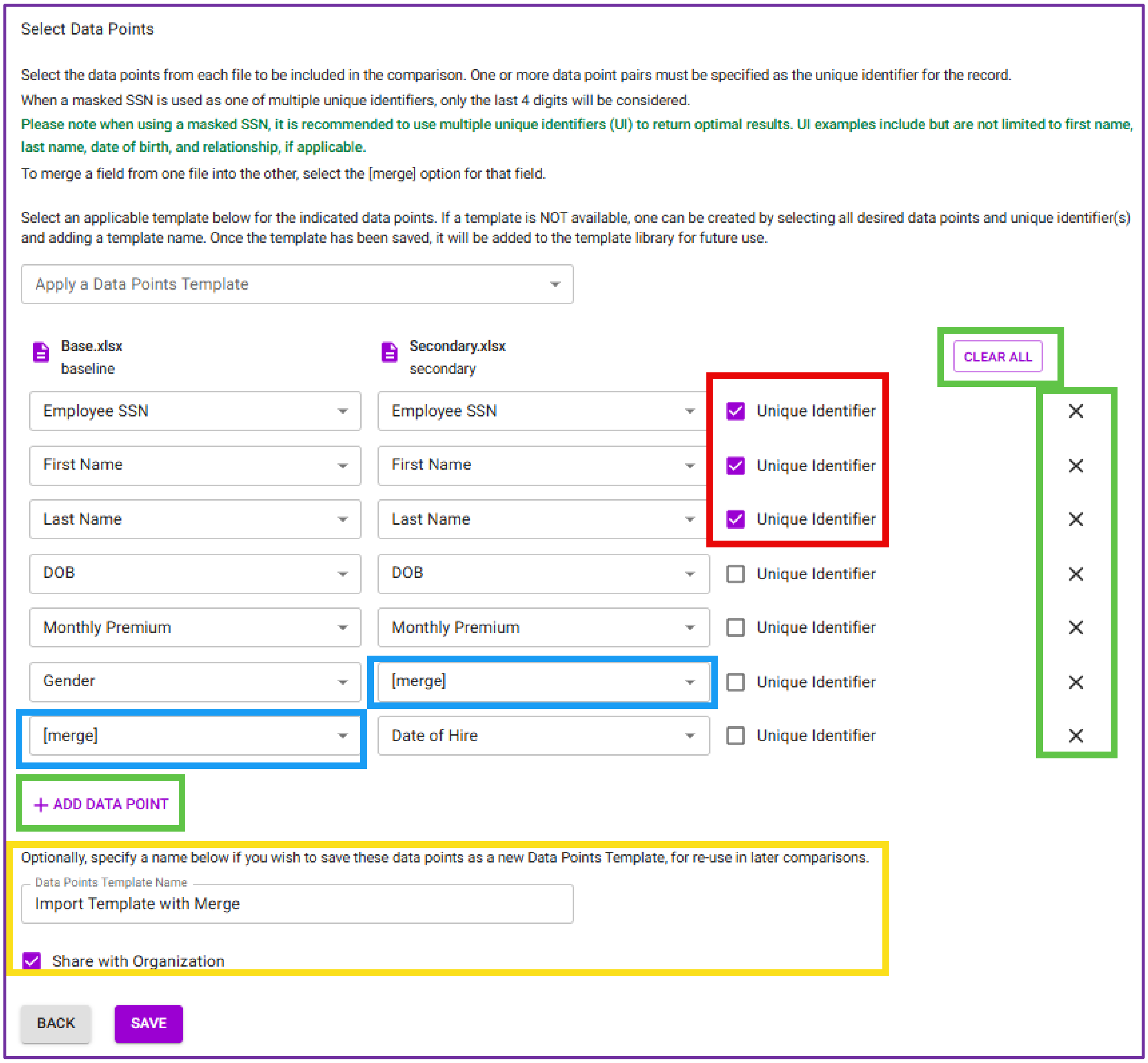
Matching data points will be auto filled. Add and/or Delete data points as needed. Select a minimum of One (1) unique identifier. Click CLEAR ALL to delete all data points.

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

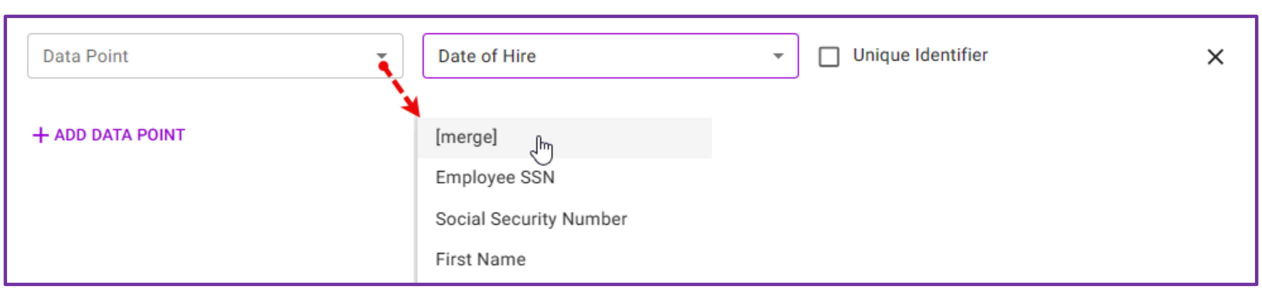
Please note when using a masked SSN, it is recommended to use multiple unique identifiers (UI) to return optimal results. UI examples include but are not limited to first name, last name, date of birth, and relationship, if applicable.

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.

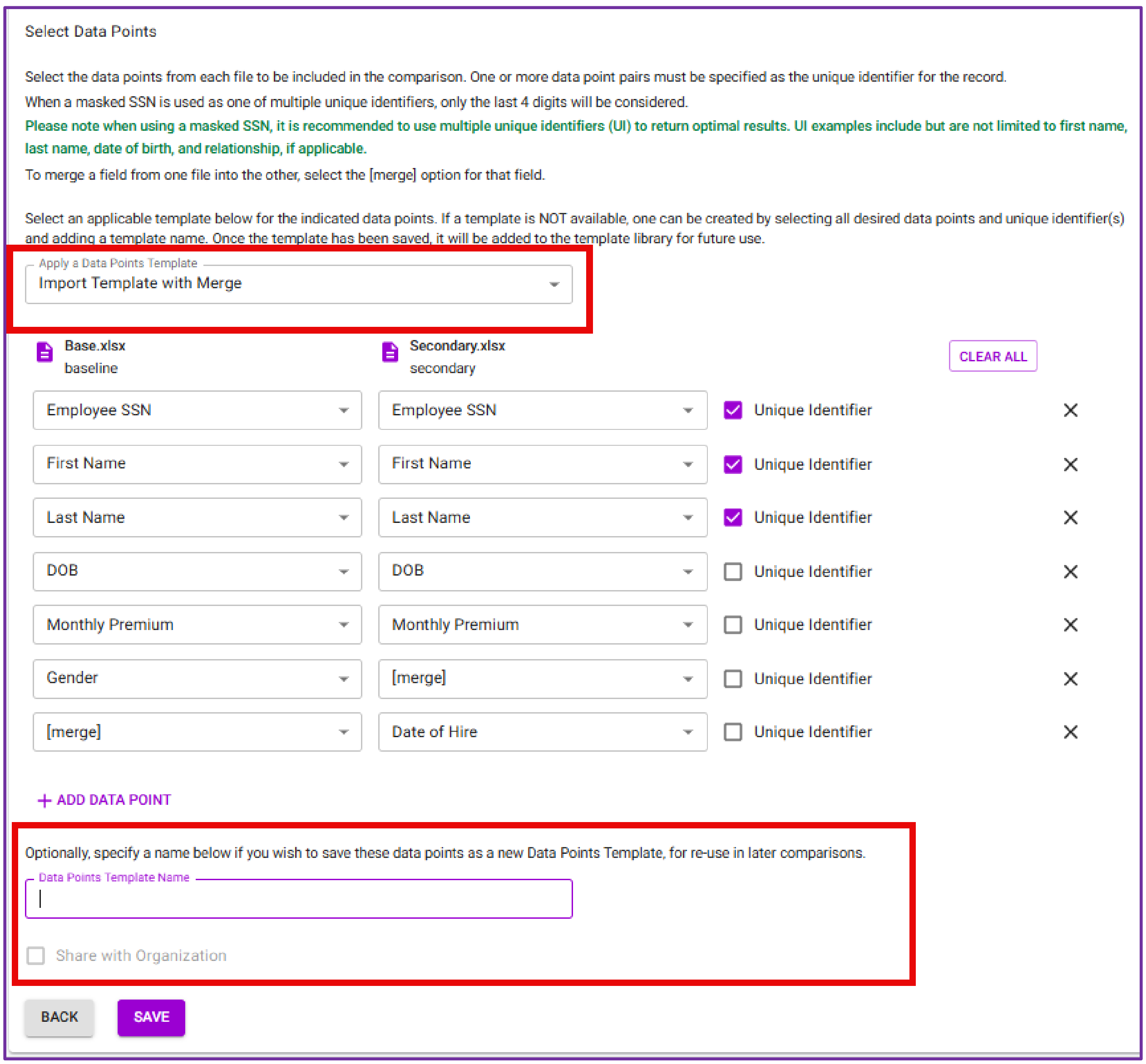


To Merge a data point without comparing, select [merge] in the corresponding dropdown



Select Data Points & Reuse Existing Template

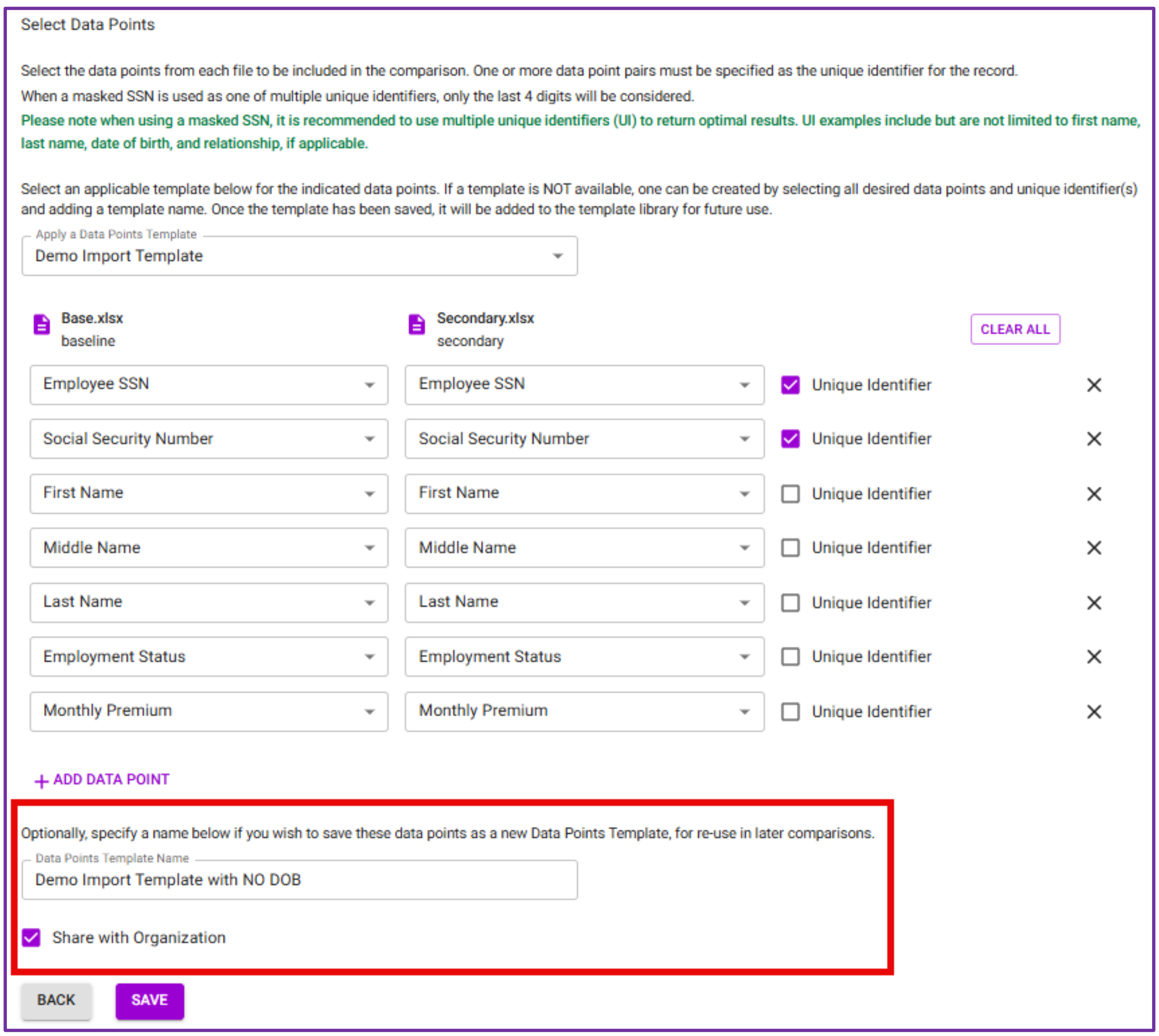
Select an applicable data points template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the import file column names. If a template is NOT available, one can be created by selecting all desired data points and unique identifier(s) and adding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



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.

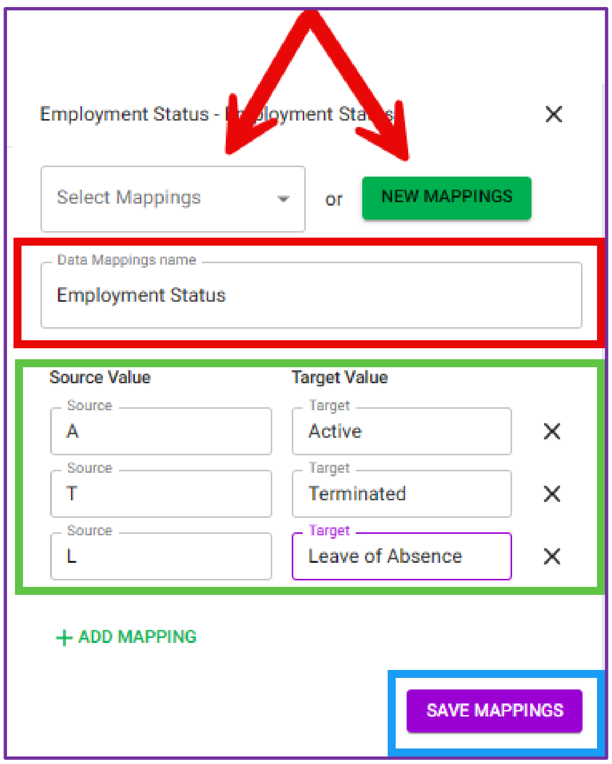


Mapping

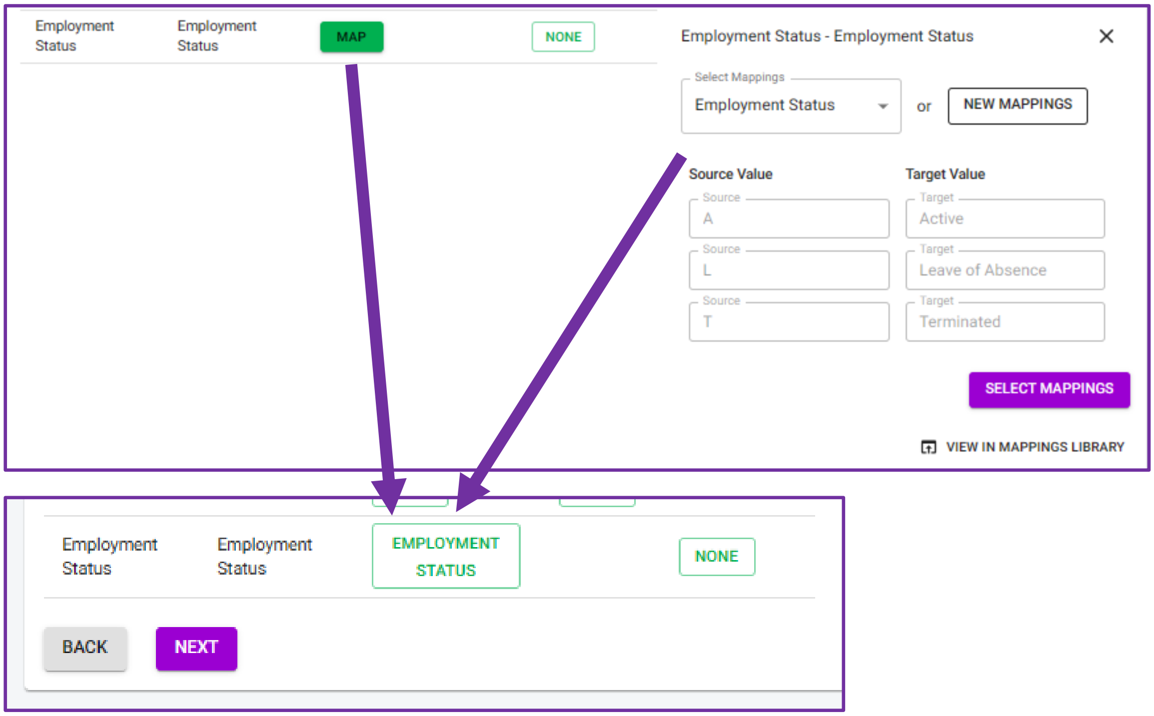
Add customized mapping for data such as plans, tiers, or departments by utilizing the MAP buttons. Existing mappings for the company or created and shared at the DMS Admin or Organization level can be re-used or new mappings can be created.

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

Click SAVE MAPPINGS to newly created mapping to save.

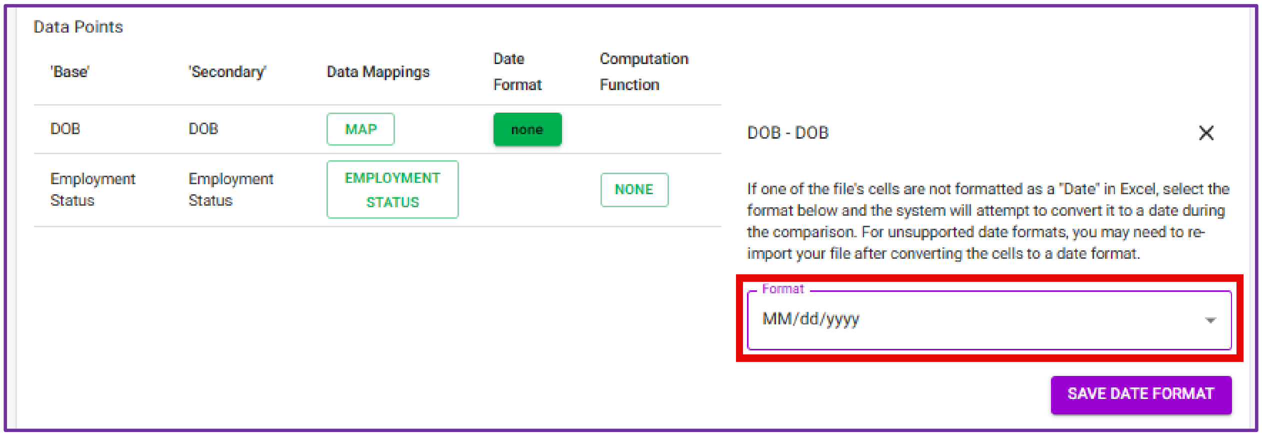


If you use existing mapping, click SELECT MAPPINGS.

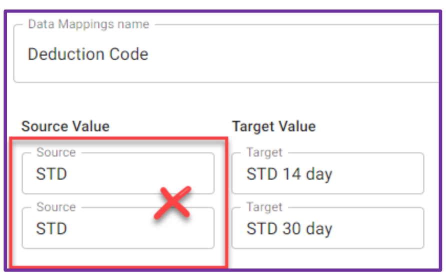


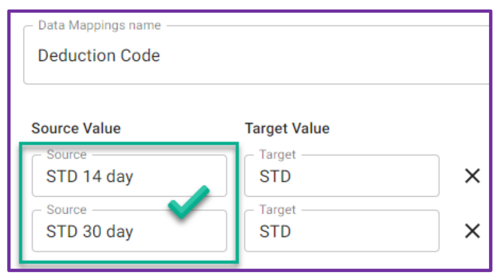
Mapping can also be added to Merged data points using the same process. The Source value will contain the original value from the file while the Target value will be what the data will be changed to in the export files.

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



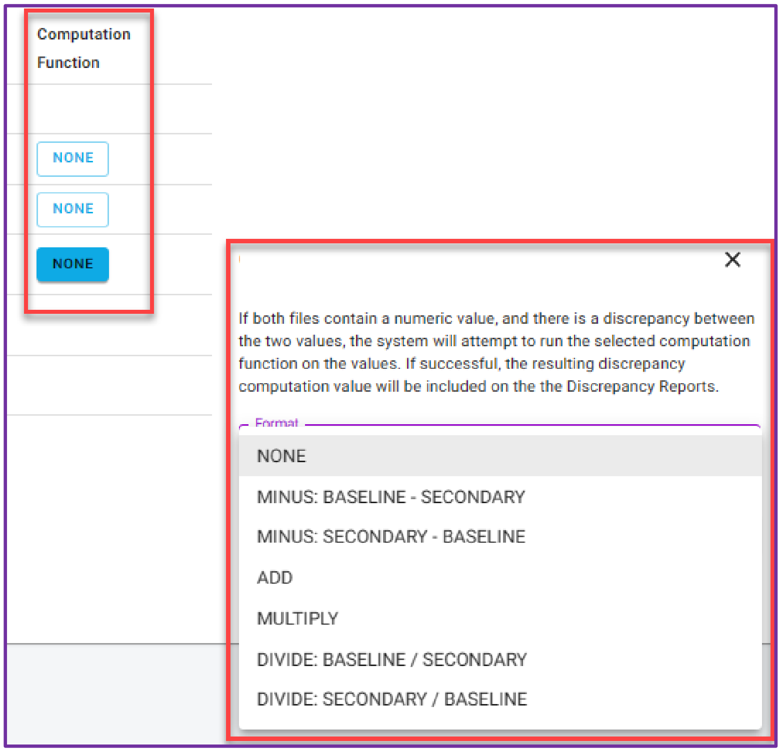
NOTE: The **SOURCE VALUE** in mapping must be unique. If the same value is used more than once under **SOURCE**, an error will occur. However, it is acceptable to use the same **TARGET VALUE** multiple times.





Mapping – Computation

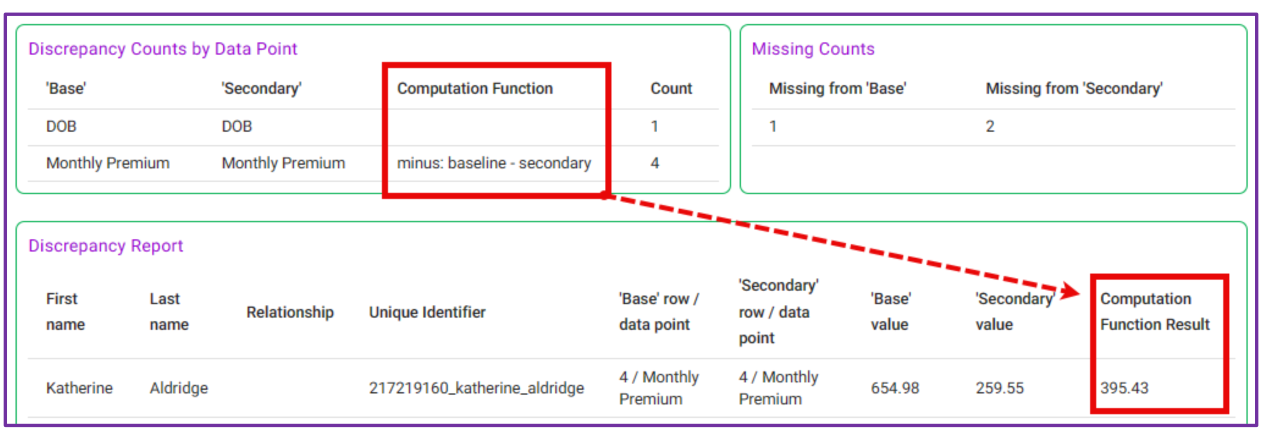
Add a computation (subtraction, addition, multiplication, division) to any numeric data point from the baseline file to any numeric data point in the secondary file. Add the computation by clicking the button under the Computation Function column for the desired data points and then selecting the function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



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

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

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



Discrepancy Counts by Data Point

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

Missing Counts

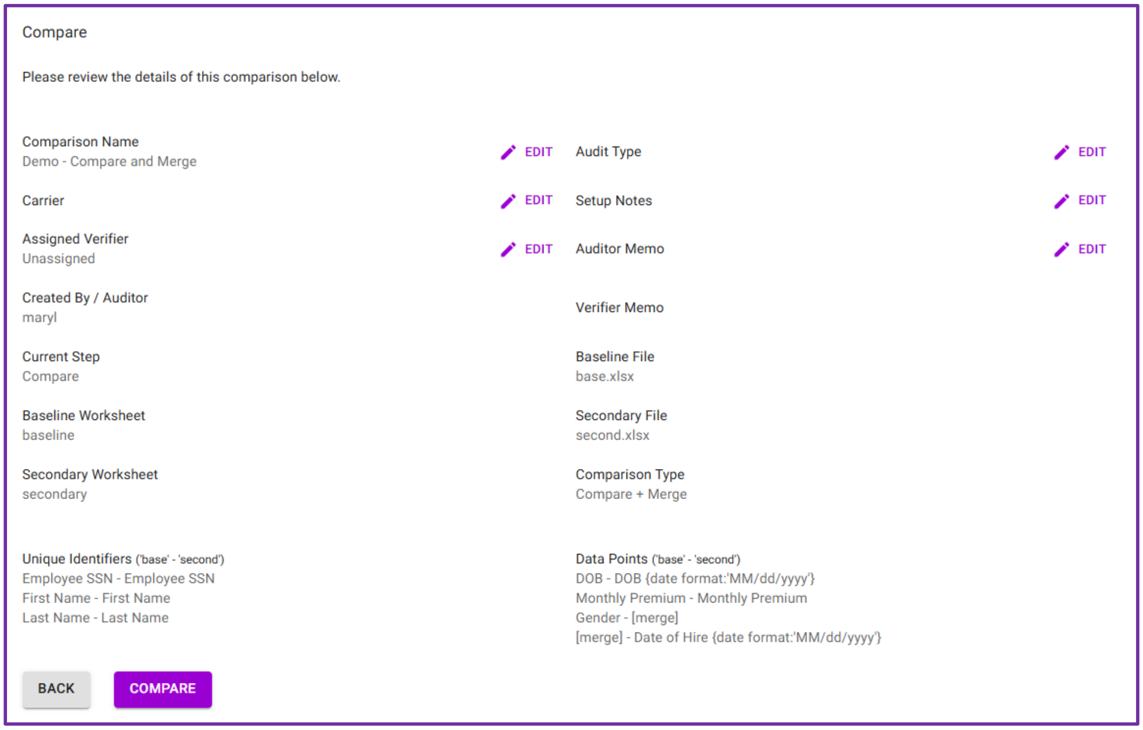
Missing from 'Base'	Missing from 'Secondary'
1	2

Discrepancy Report

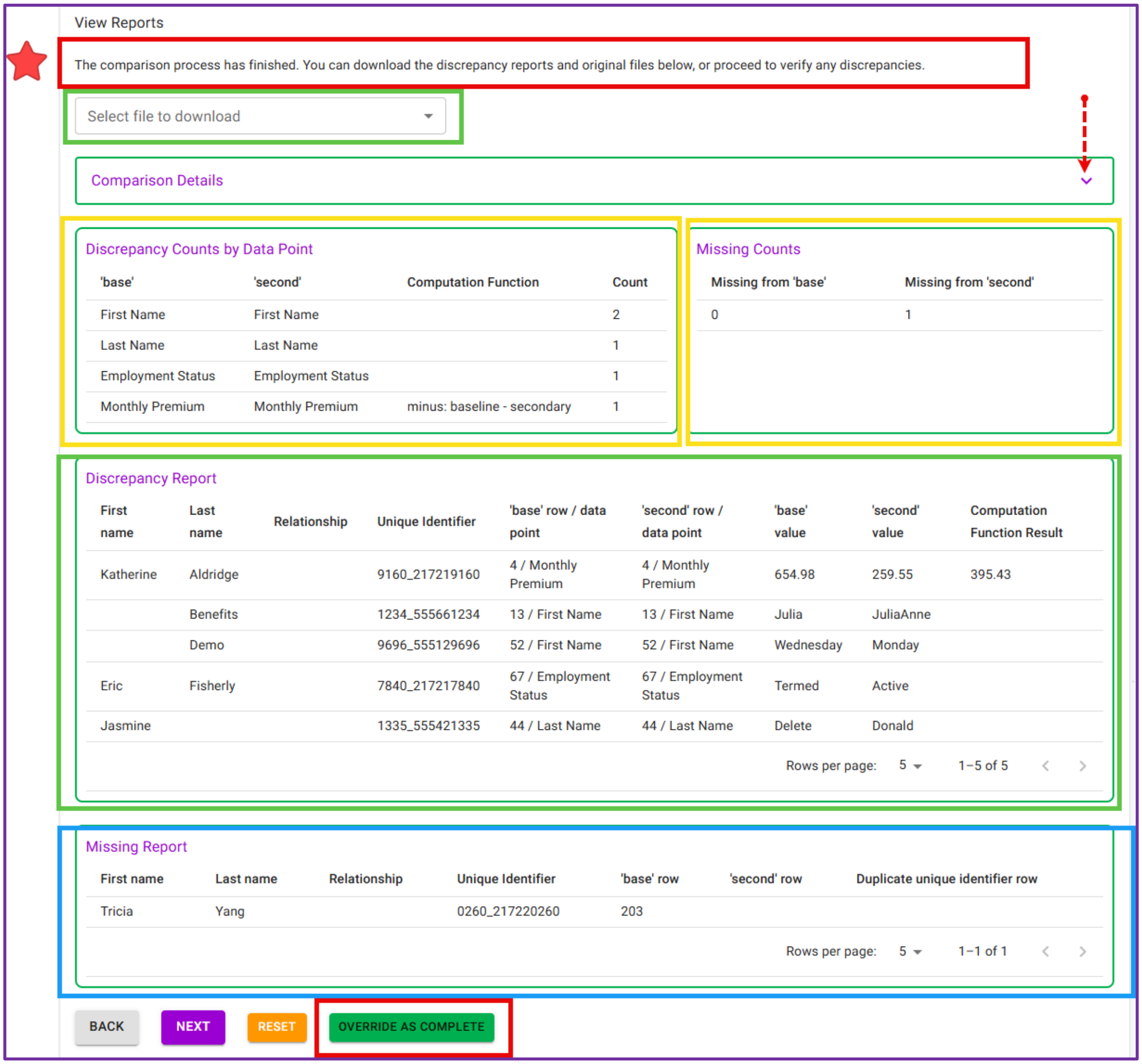
First name	Last name	Relationship	Unique Identifier	'Base' row / data point	'Secondary' row / data point	'Base' value	'Secondary' value	Computation Function Result
Katherine	Aldridge		217219160_katherine_aldridge	4 / Monthly Premium	4 / Monthly Premium	654.98	259.55	395.43

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.



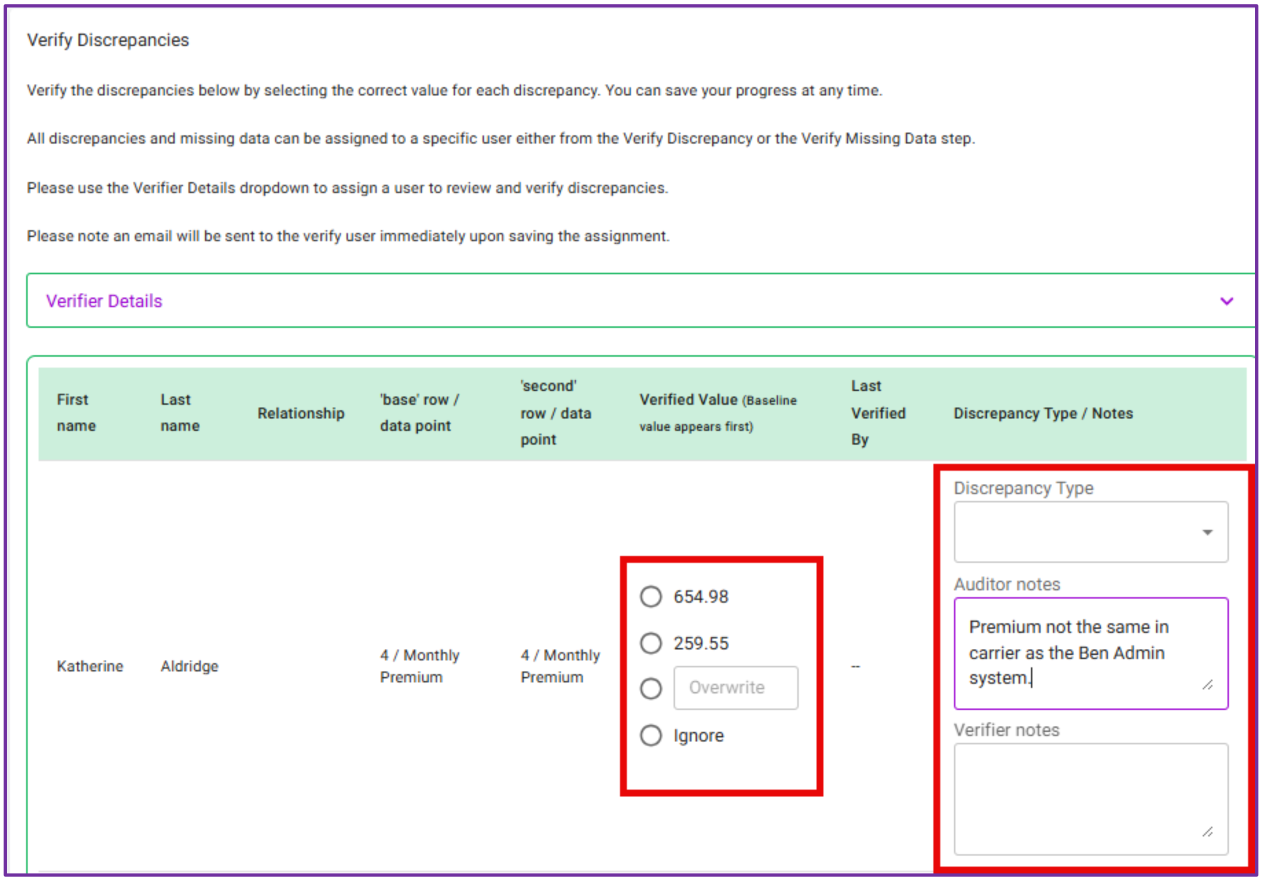
Compare is complete. Comparison results are available for view and for download by clicking the SELECT FILE TO DOWNLOAD. The original files can also be accessed from the dropdown as well as another discrepancy report where all data points are included for the row where a discrepancy was identified. If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



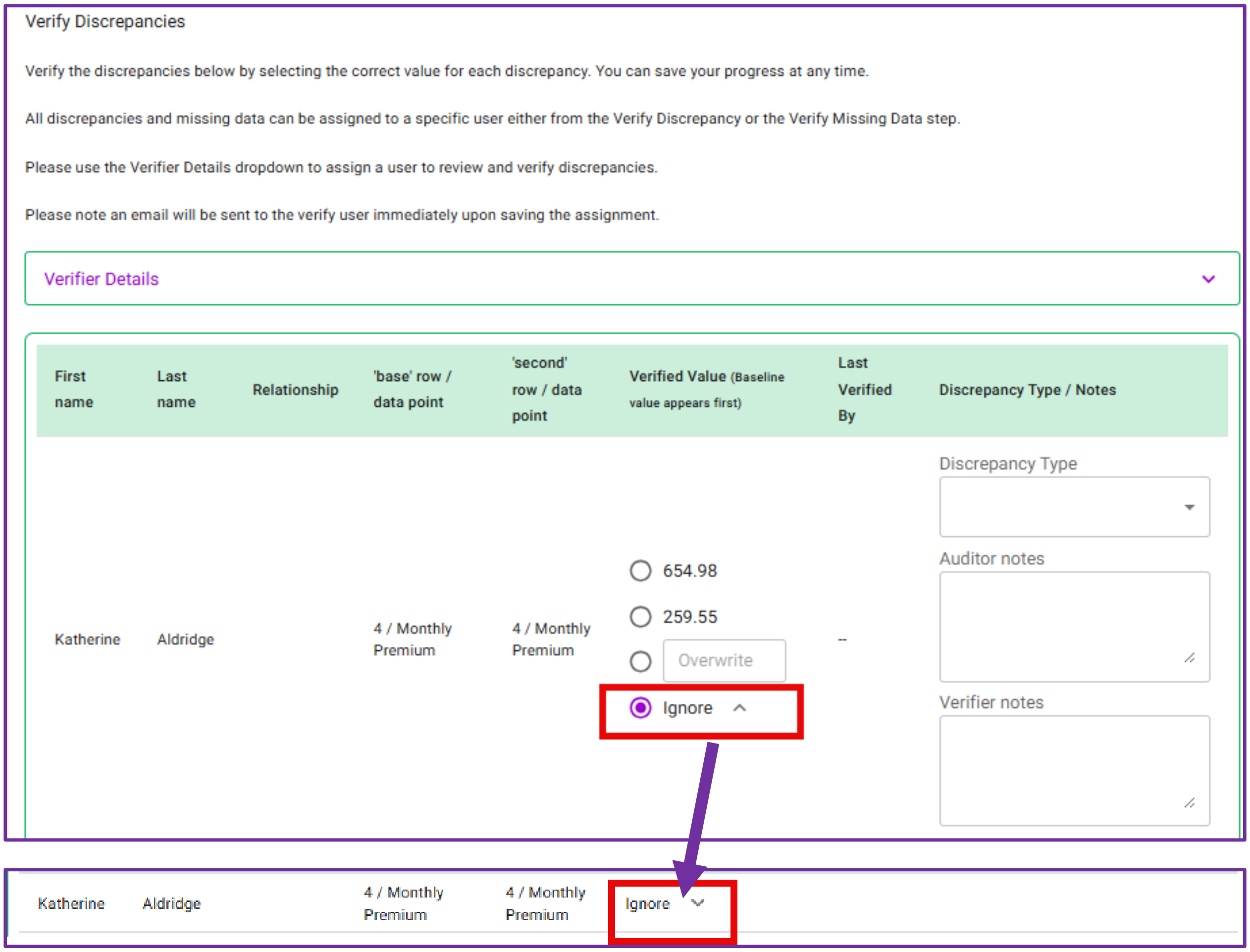
Verify Discrepancies

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

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



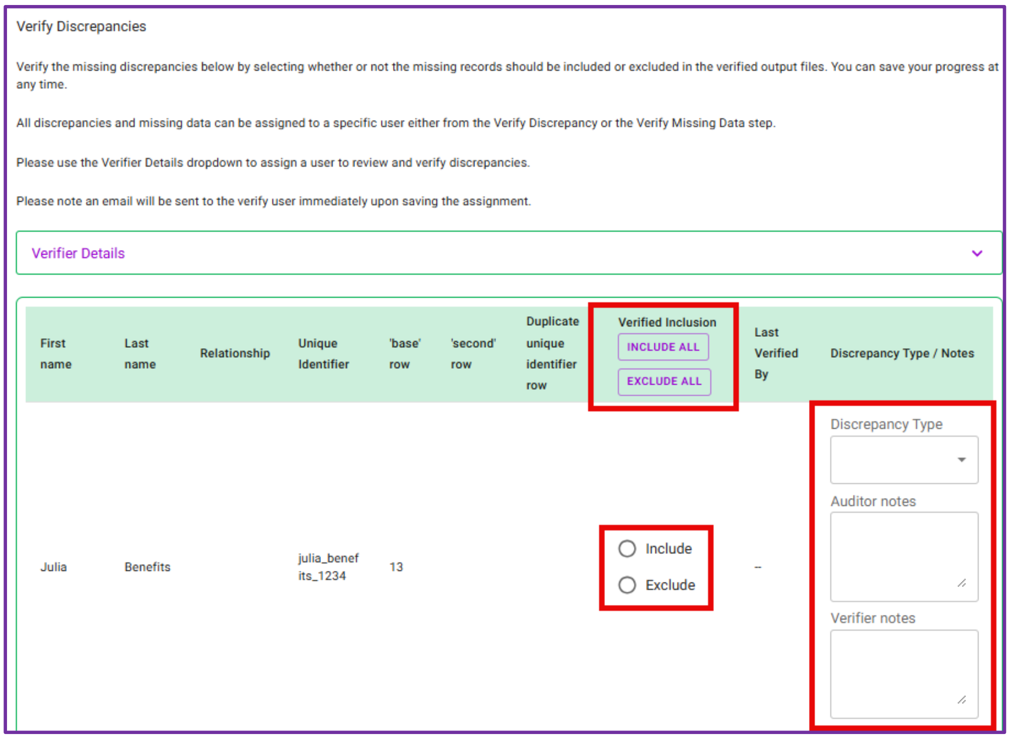
If the discrepancy is not a true discrepancy or if the verifier desires to ignore it, select IGNORE. Any discrepancy marked as IGNORE, can be minimized by clicking the caret (^)



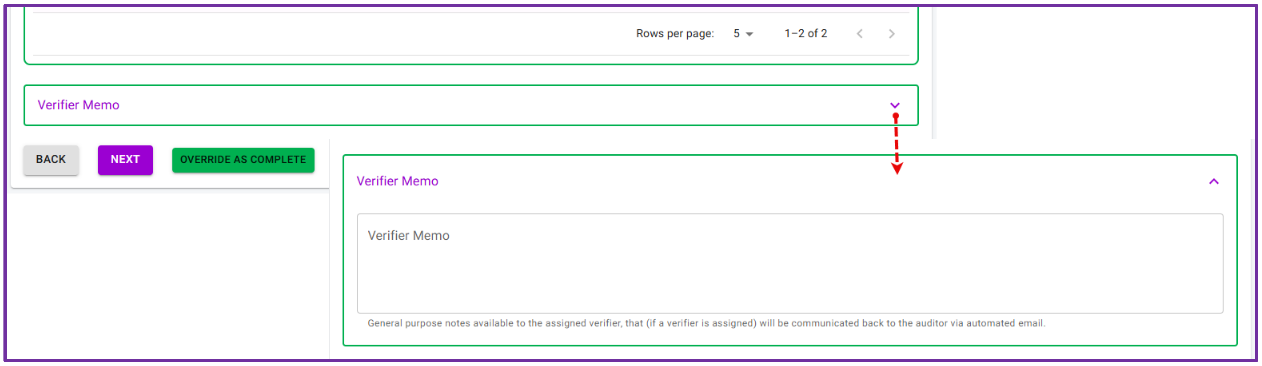
Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.

Verify Missing

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

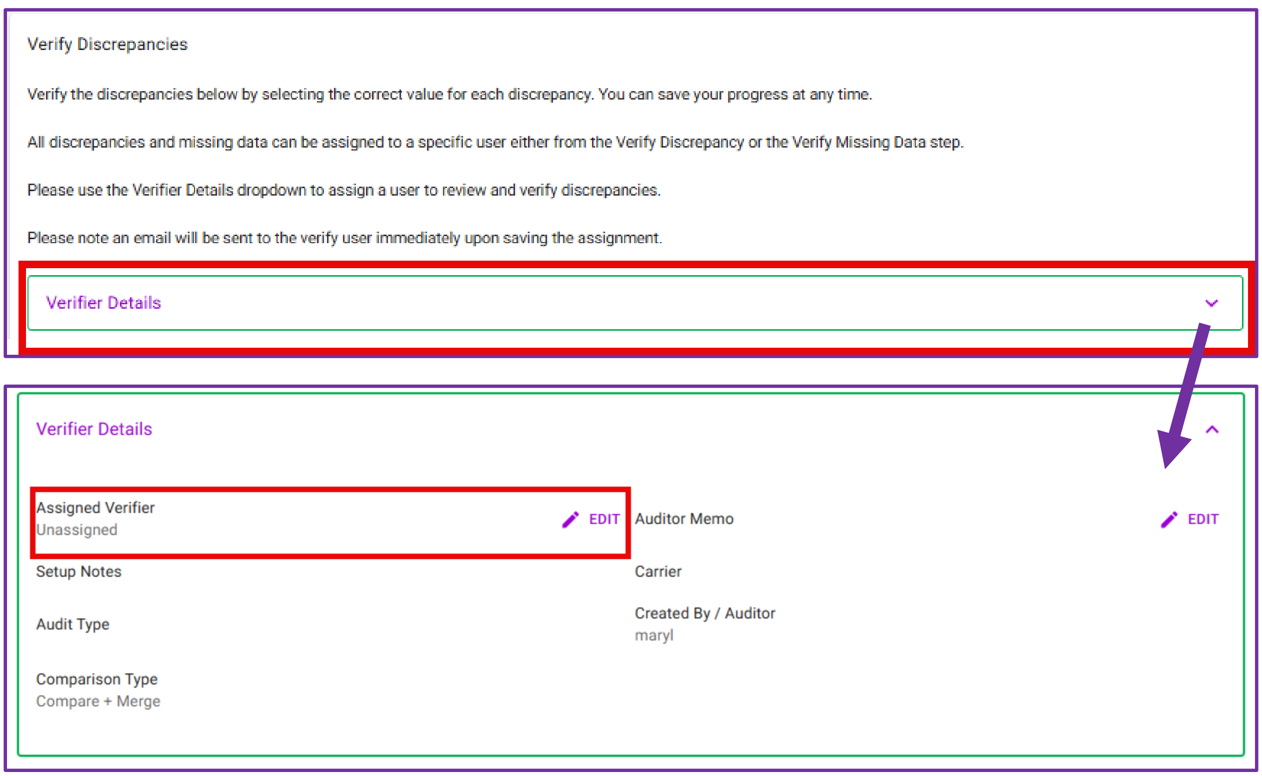


Additional information can be included to the auditor by utilizing the VERIFIER MEMO dropdown found at the bottom of the Verify Discrepancies and Verify Missing steps. The Verifier Memo is automatically included in the email back to the Auditor.



Assign a Verifier to the Compare

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



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

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

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

Hello {Verifier First Name},

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

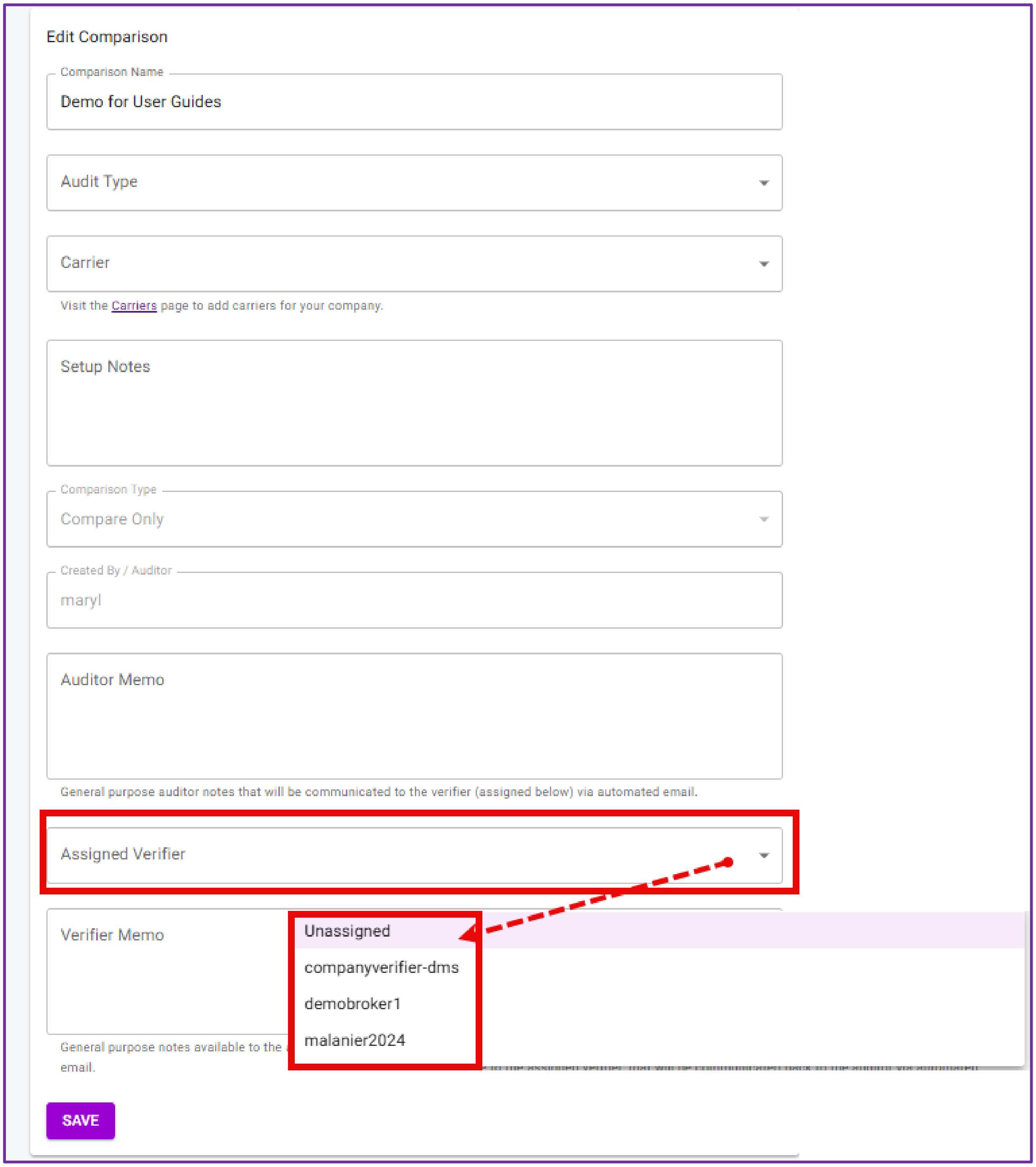
Please click here below to log in and complete the verification process for any discrepancies.

{Auditor Memo}

Thank you,

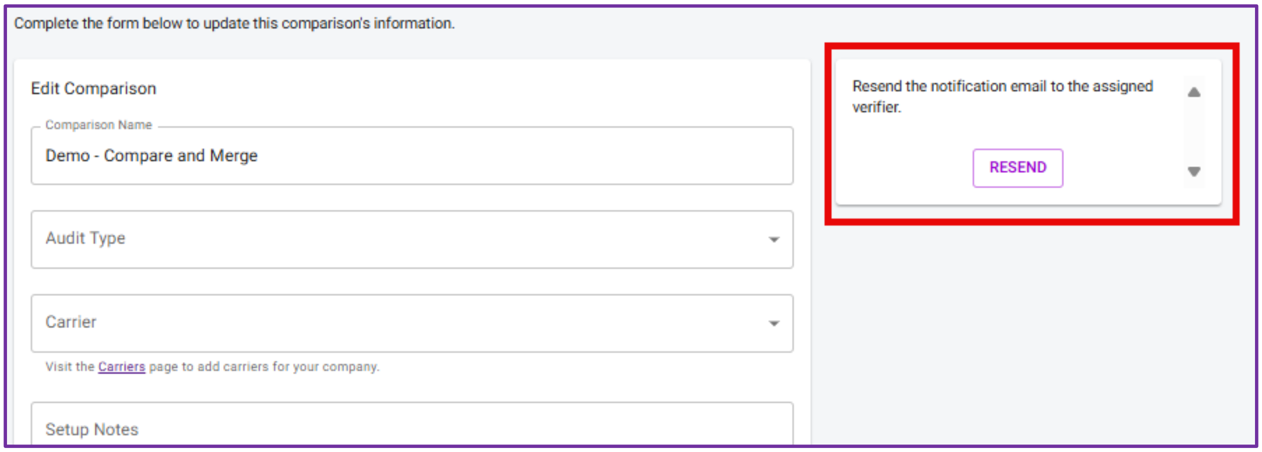
On behalf of {Auditor First Name and last Name}, {Organization Name if Org Level or Company Name if Company Level User}

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



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

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



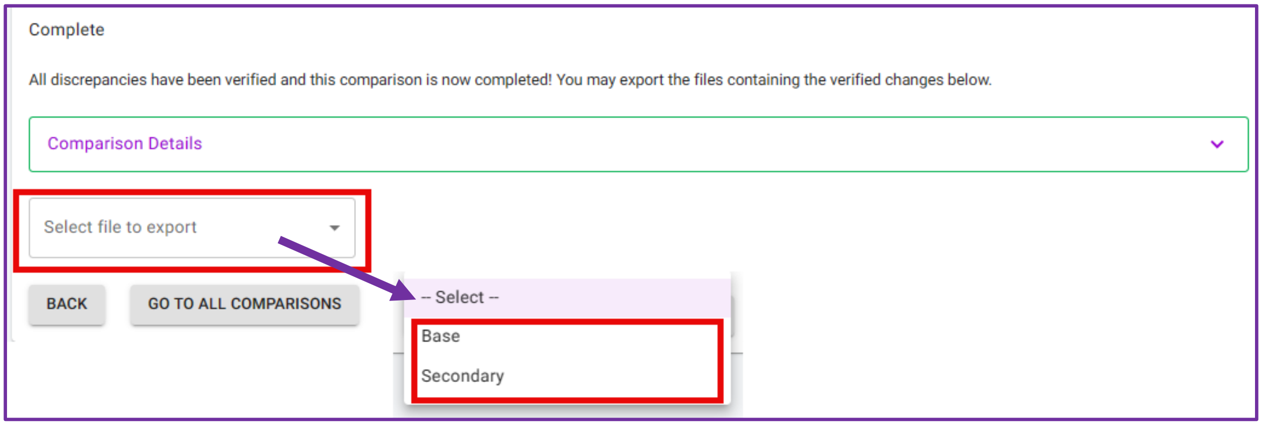
Complete the Compare

Data verification is complete.

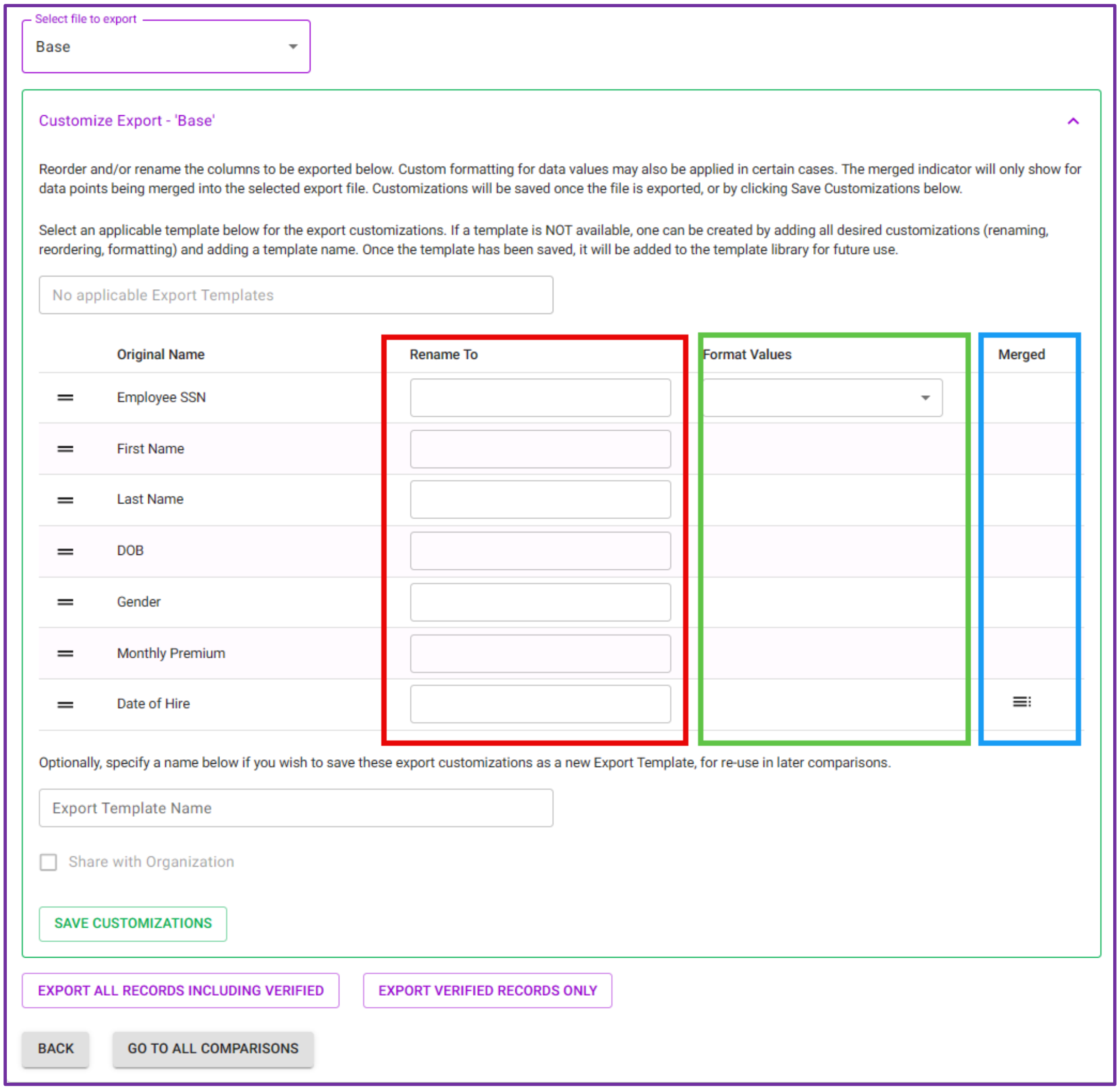
If the audit was assigned to a specific user within the application, the auditor will receive a notification email that the audit is complete.

> 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.

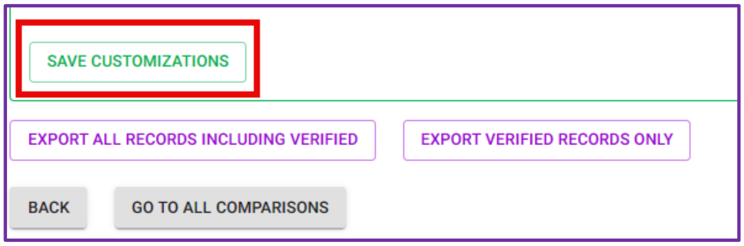


Column names can be renamed and saved. Employee SSN and like key words such as Social Security Number can be formatted with or without dashes. The Format Values option will also appear if the Rename To value is one of the application's key words. For a list of the keywords, please reference the Key Words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



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

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

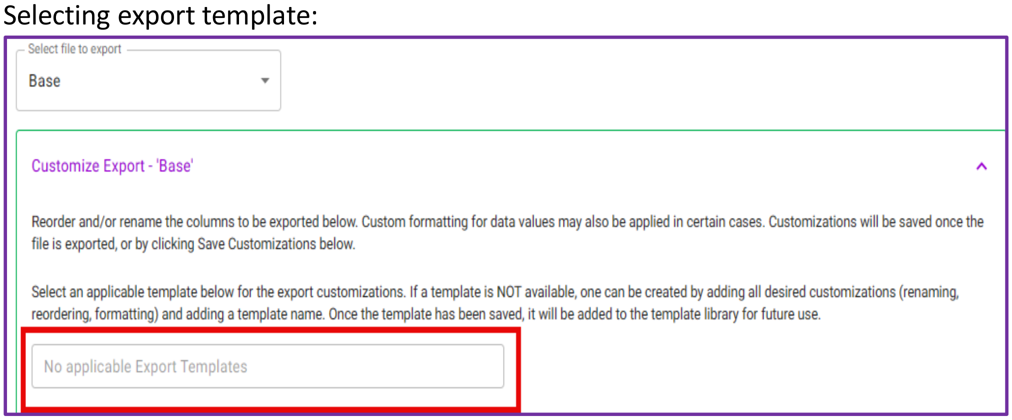


Export Template

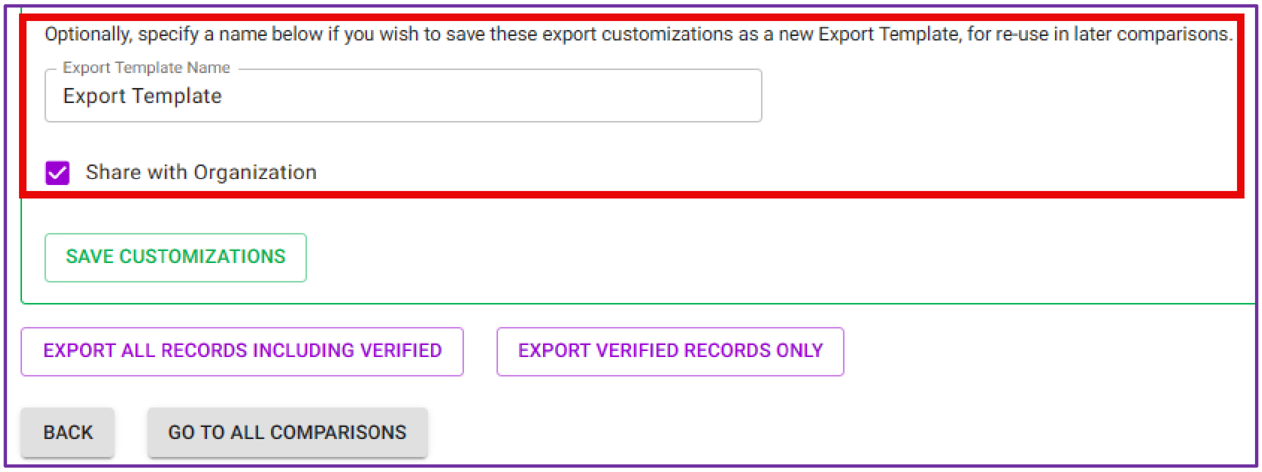
Select an applicable export template from the dropdown for the indicated data points. A template will only appear if the data points correspond to the file column names. If a template is NOT available, one can be created by adding customizations such as renaming, reordering, or reformatting then naming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

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:



Saving New Export Template:



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

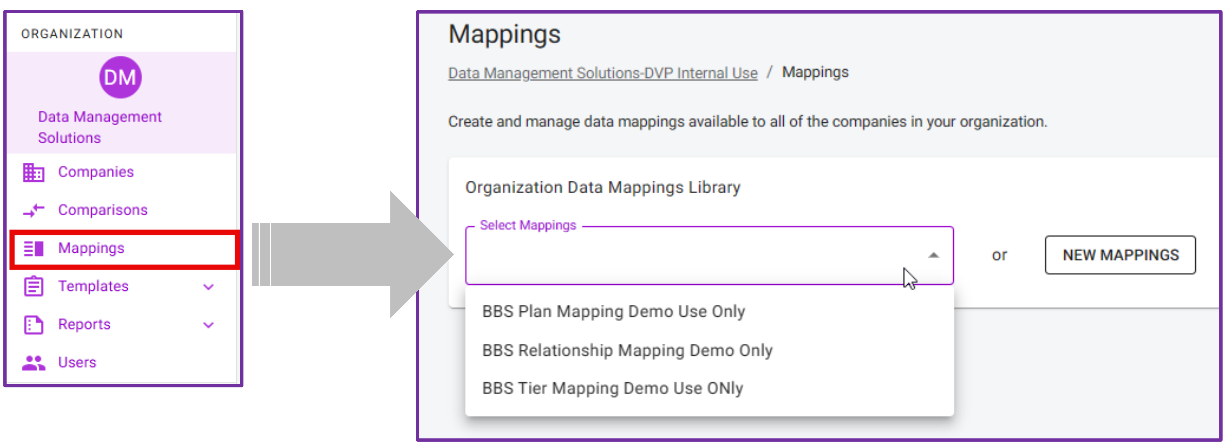
Questions: Contact Support@dms-datavalidate.com

Create Organization Level Mapping

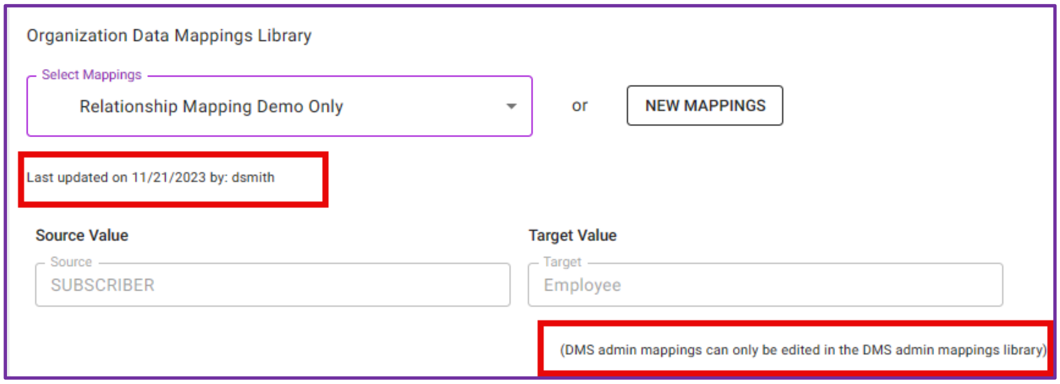
The Data Management Solutions application offers Organization Level mapping that can be used across multiple companies. This eliminates the need to create duplicate mappings such as coverage tier and relationship per company.

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.

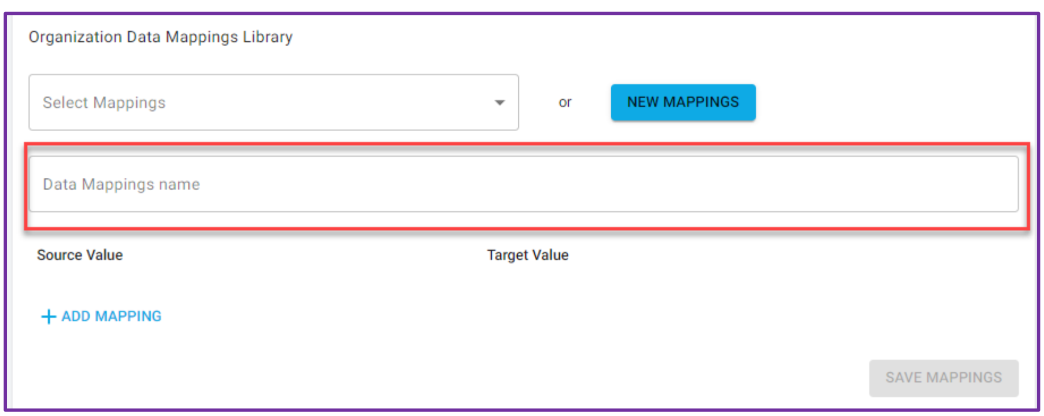


NEW MAPPINGS

This begins the mapping creation process.

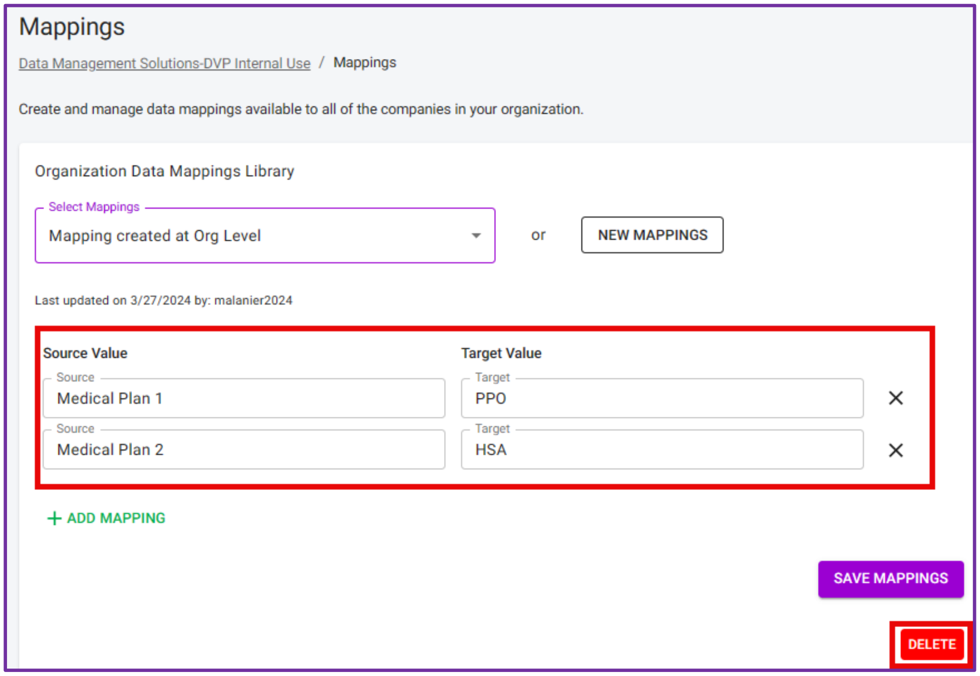
Name Mapping

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.



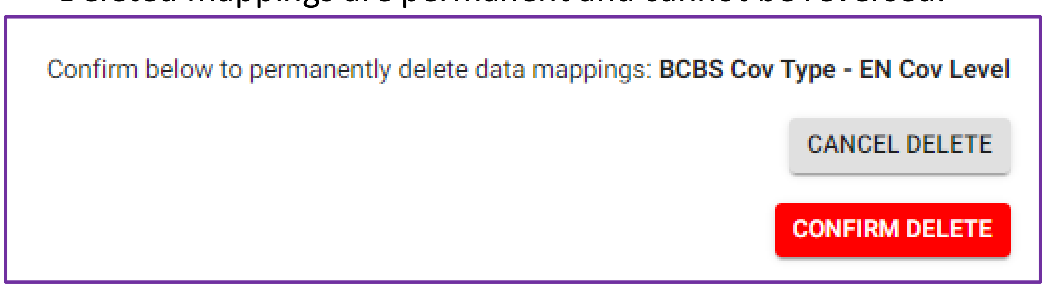
Source and Target Values

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.

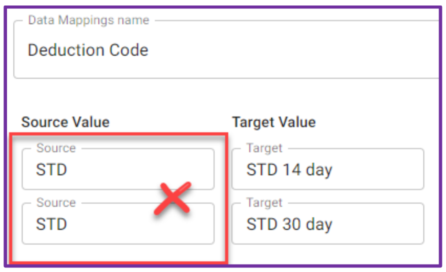


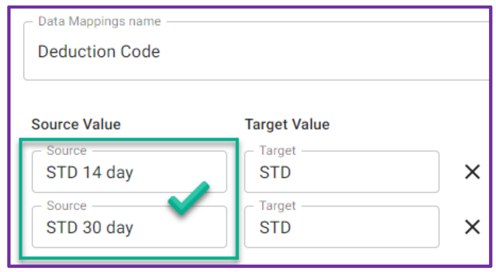
***If a mapping is currently in use, it cannot be deleted or edited.

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



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.





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.

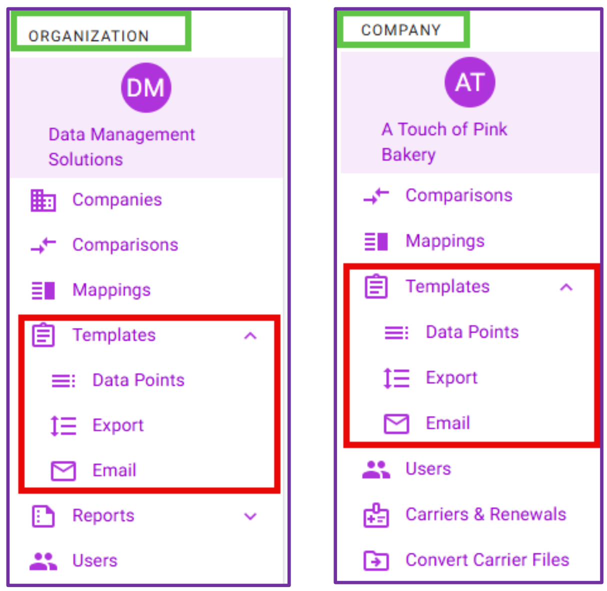
The data points and export templates are not editable other than the name. However, they can be deleted. Please be aware that a deleted template cannot be recovered, and the deletion is permanent. If deleted in error, the template will need to be recreated during the compare.

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.

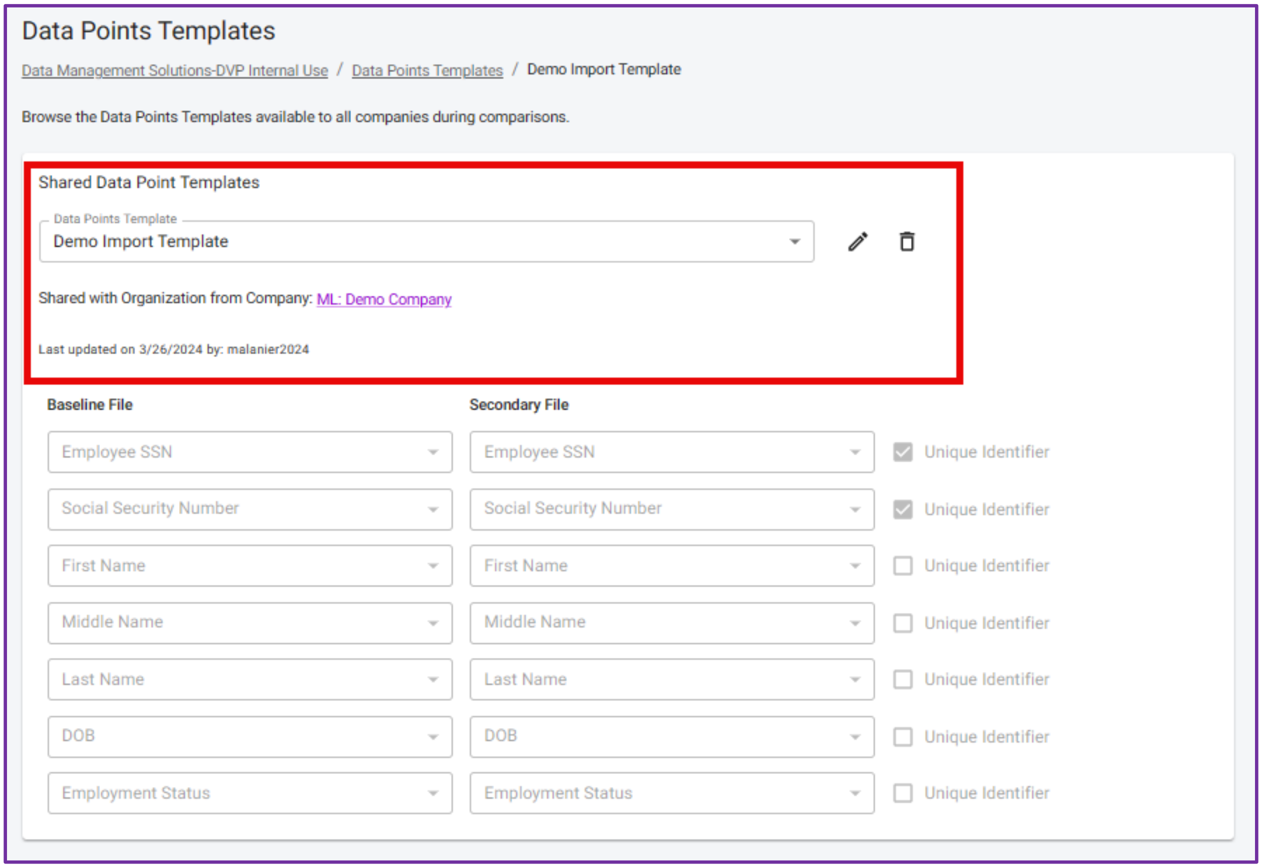
If customization is present the priority is

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 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:

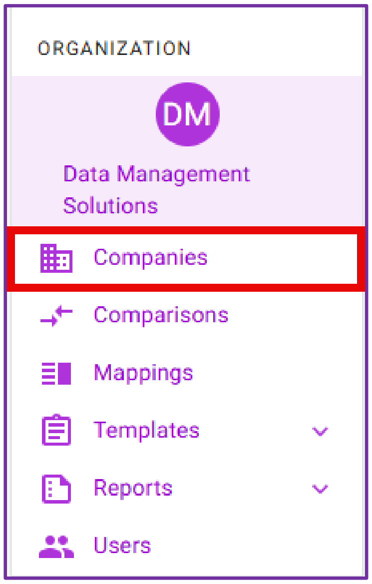
- Company name
- Active status
- Updated at timestamp
- Termination date and reason
- Activation date
- First demo date
- Any associated notes

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.

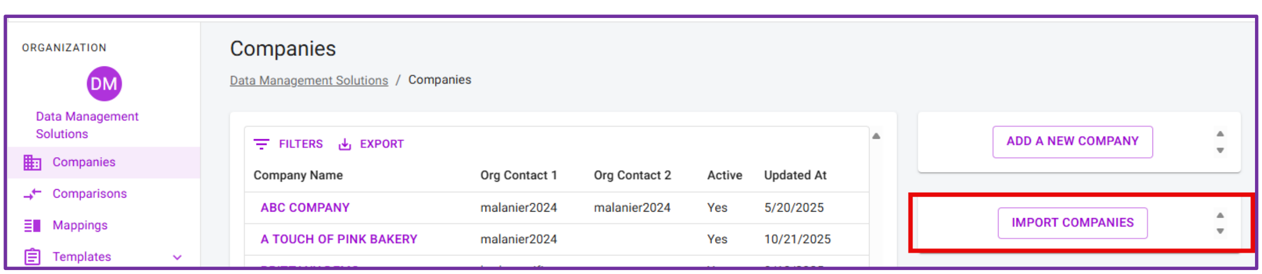


Using the provided import template, complete the following fields:

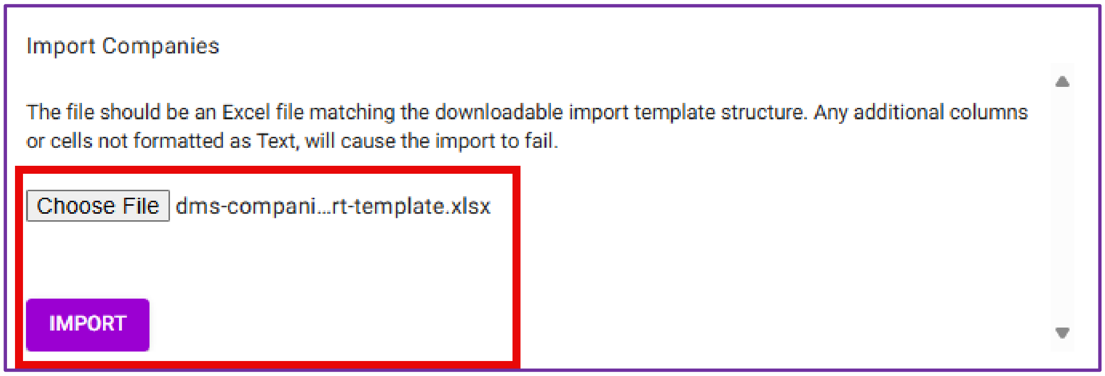
- Company name (Required)
- Notes (Optional)
- First demo date (Optional)
- Activation date (Optional - effective date of company in the application)
- Primary Organization Contact Username (Optional)
- Secondary Organization Contact Username (Optional)
- Organization Benefit Admin System (Optional)

  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.

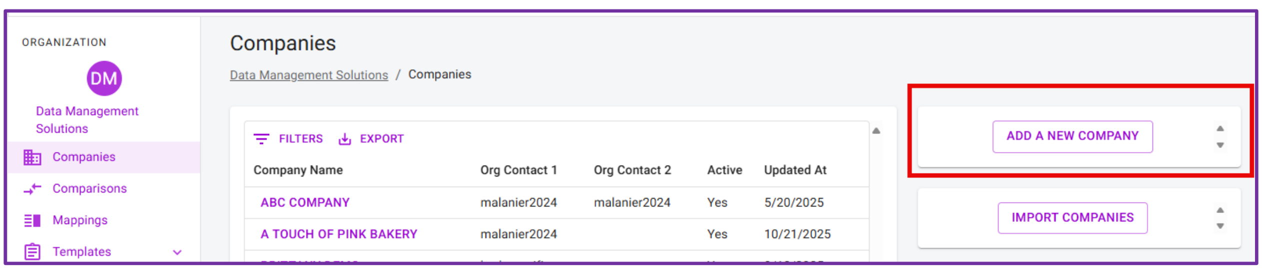


Choose file and click IMPORT.



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.

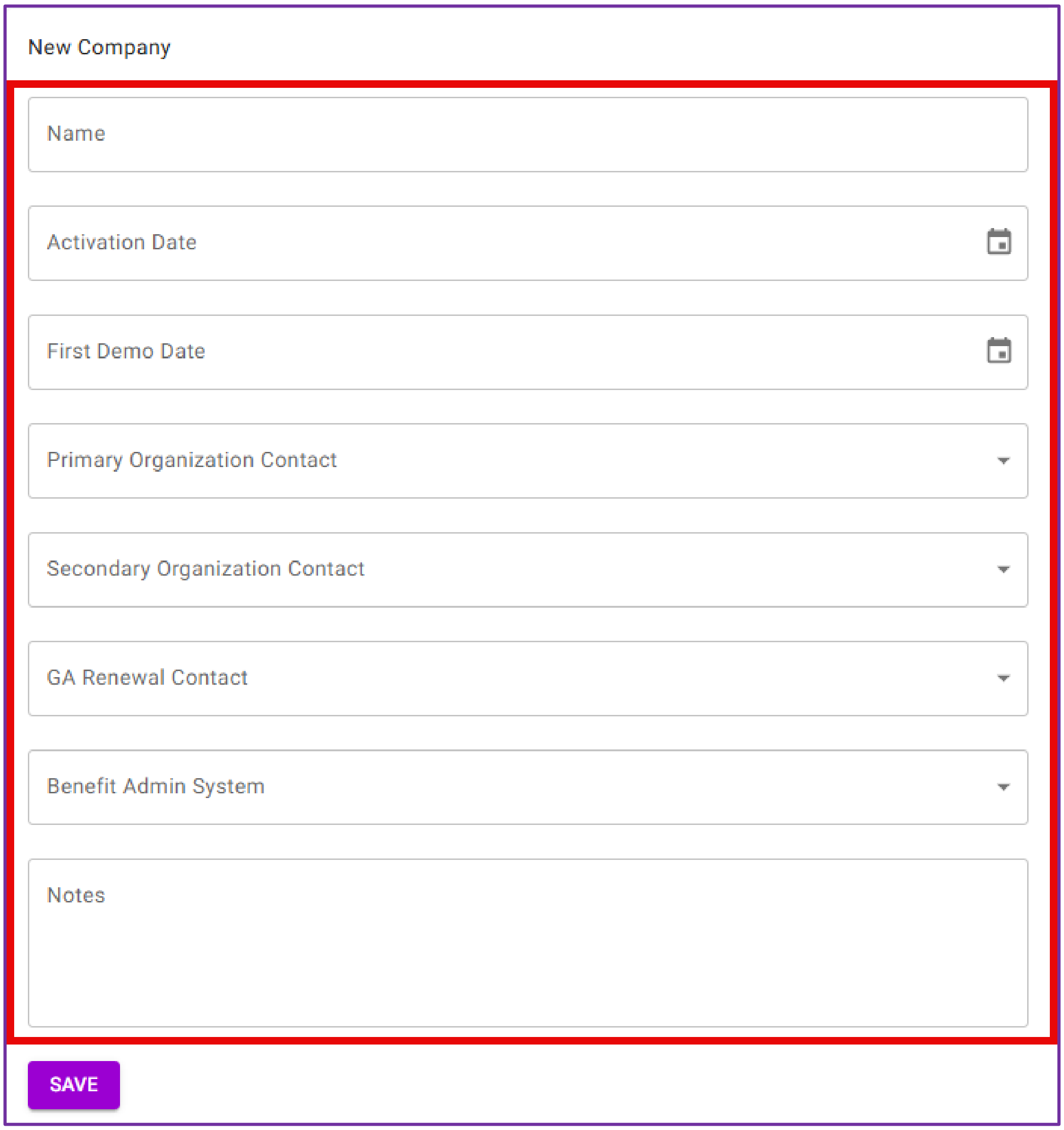


Add the following:

- 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)

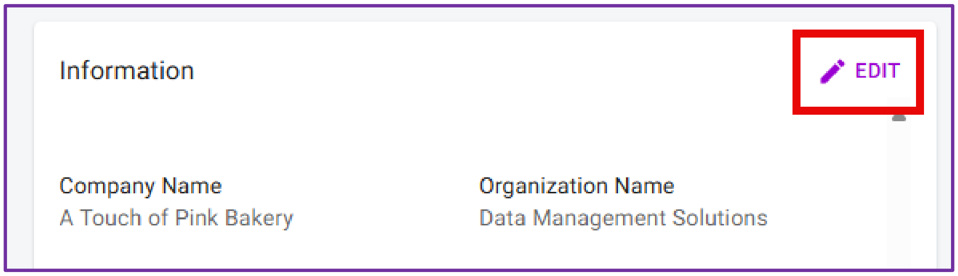
- Benefit Admin System (Optional - select from available dropdown)
- Notes (Optional)

Once all information has been added, click SAVE.

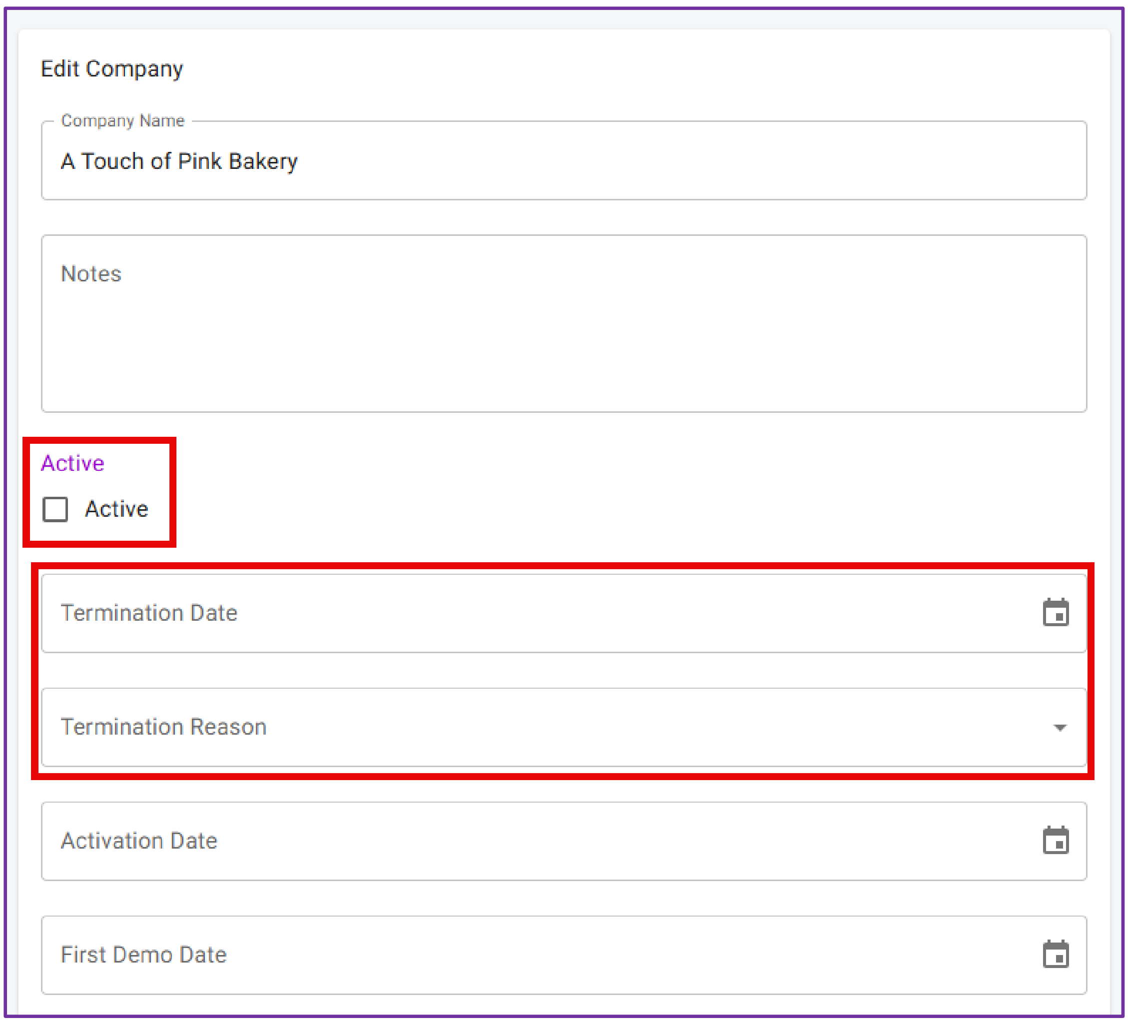


Deactivate a Company

To deactivate a company, click EDIT

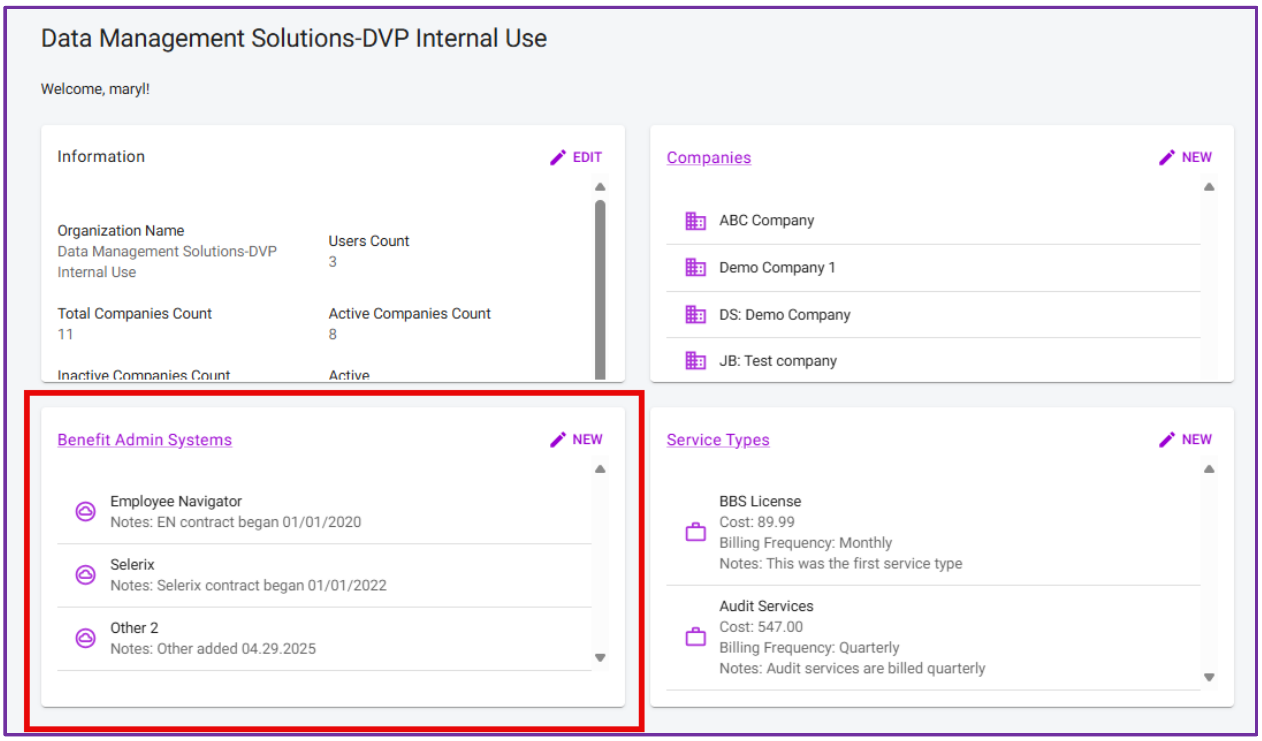


In the available screen uncheck ACTIVE and enter a termination date and a termination reason for the deactivation. Click Save. Please note that the date has to be current or past. Future termination dates are not available.



Benefit Administration System Tracking

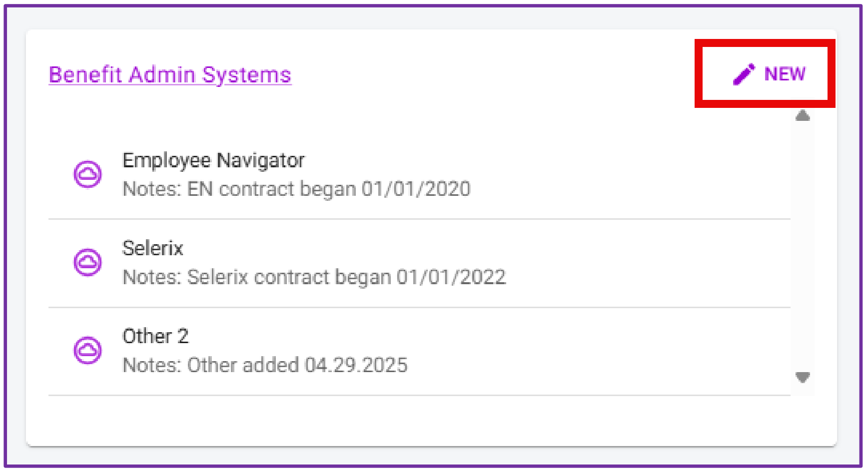
The Data Management Solutions application provides the option to track the benefit administration systems used for the organization which will then be available for selection at the Company Level. The tracking table is located on the Organization landing page.



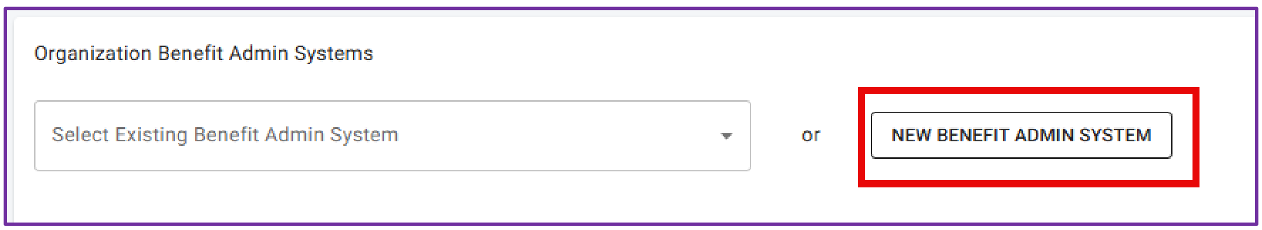
Add a Benefit Admin System

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

Click NEW

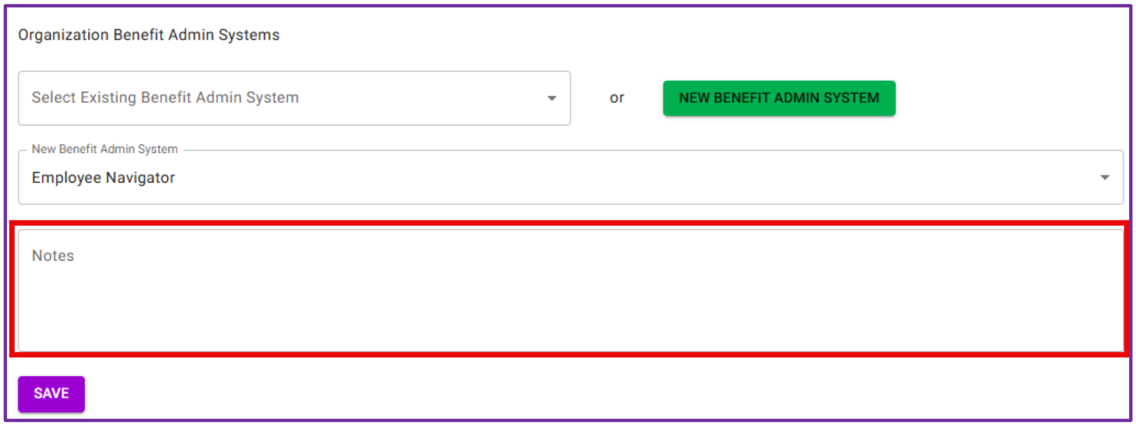


Click NEW BENEFIT ADMIN SYSTEM



Select the benefit admin system from the available dropdown.

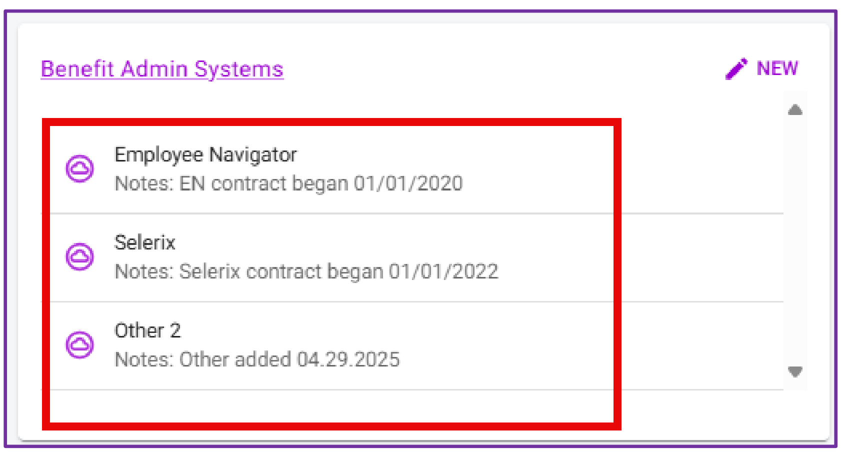
Add any notes pertaining to the system and click SAVE. This system is now available to be added to a Company.



Edit/Delete a Benefit Admin System

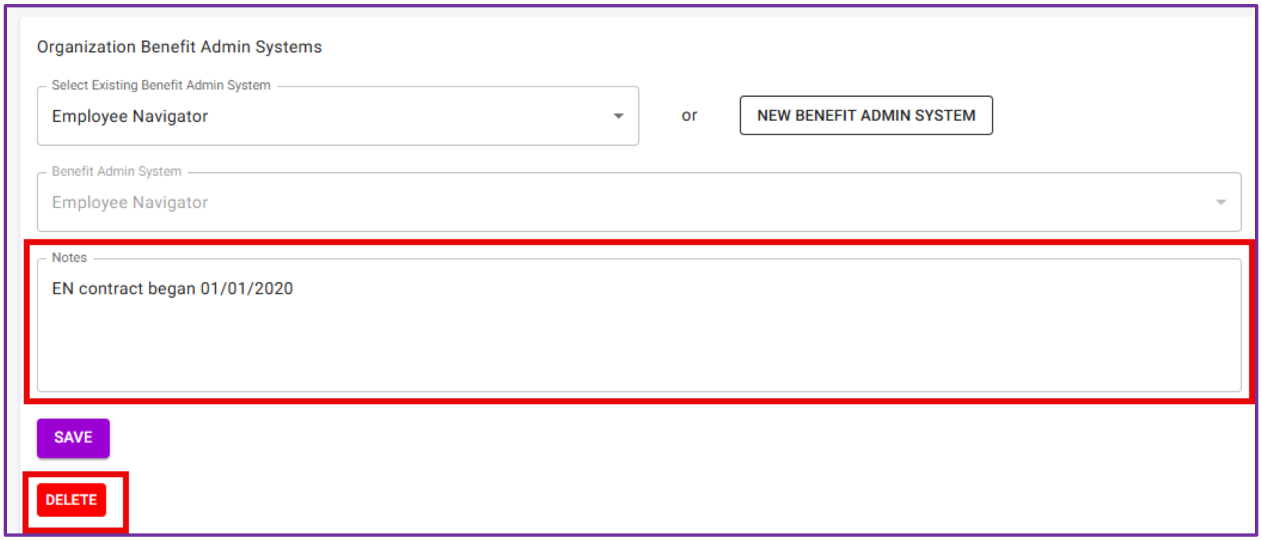
Navigate to the Organizations landing page

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



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

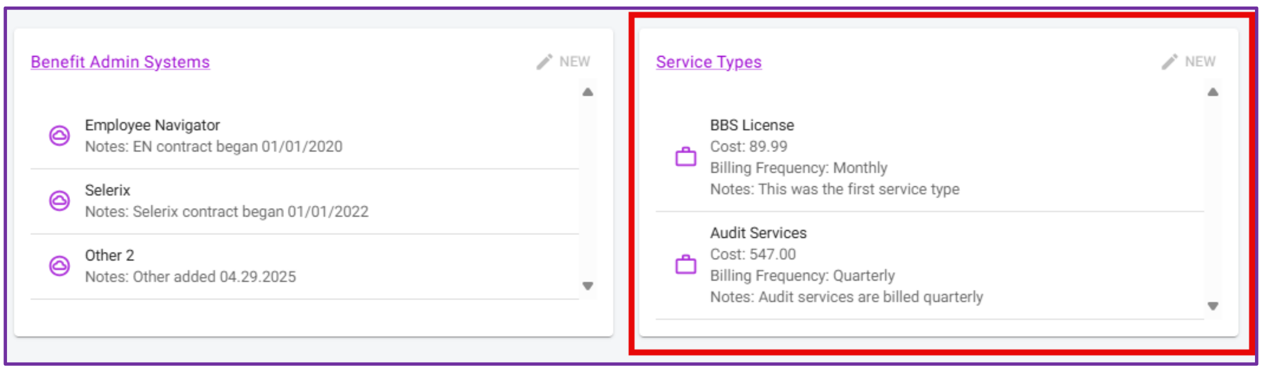
To delete the system from the Organization, simply click DELETE. However, please note that if the system is currently in use under a company, the system cannot be deleted. The system will need to be deleted from ALL companies in order to delete.


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

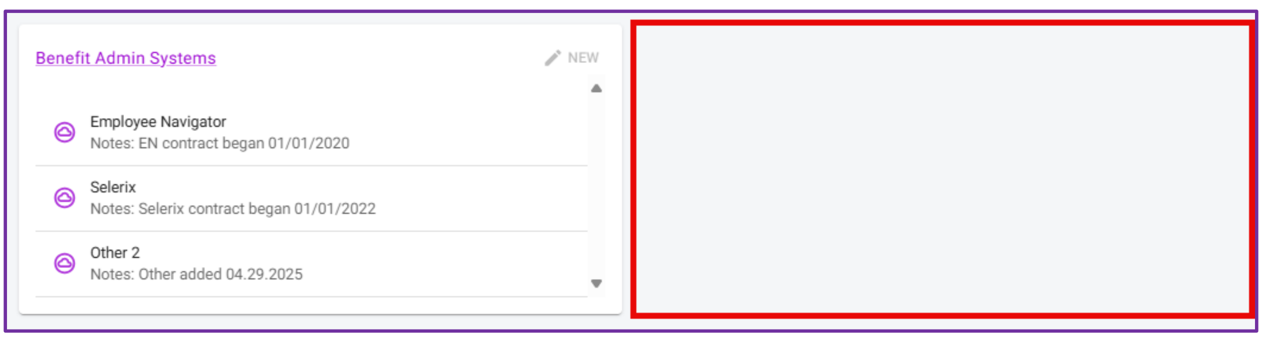
Service Type Tracking

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:



Non-Billing Contact:



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:

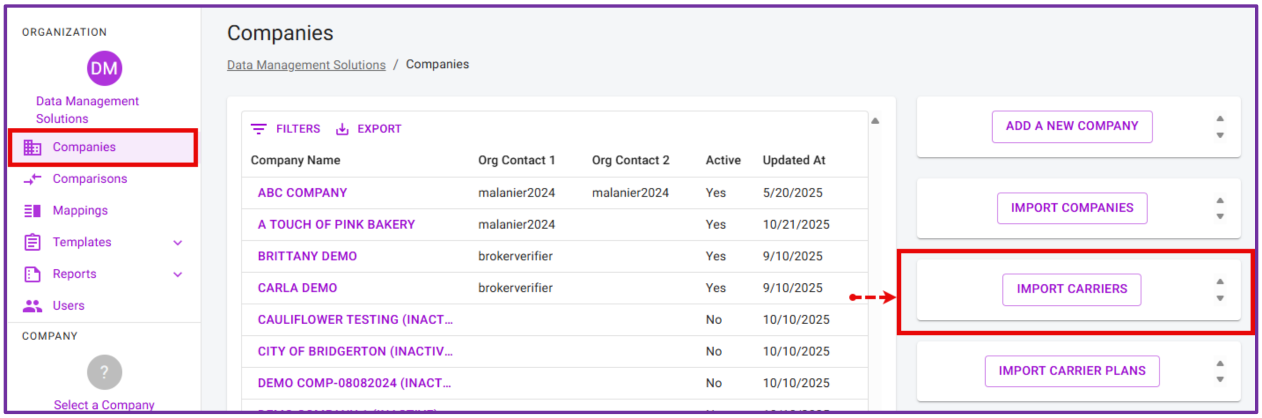
- Company Name (Required and must match company name in application)
- Carrier Name (Required and must match carrier name found in Import Template)
- Group Number (Required)
- Renewal Month (Required)
- Renewal Kickoff Days in Advance (Can choose between 30 to 90 days)
- Carrier Invoice Day of Month (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.

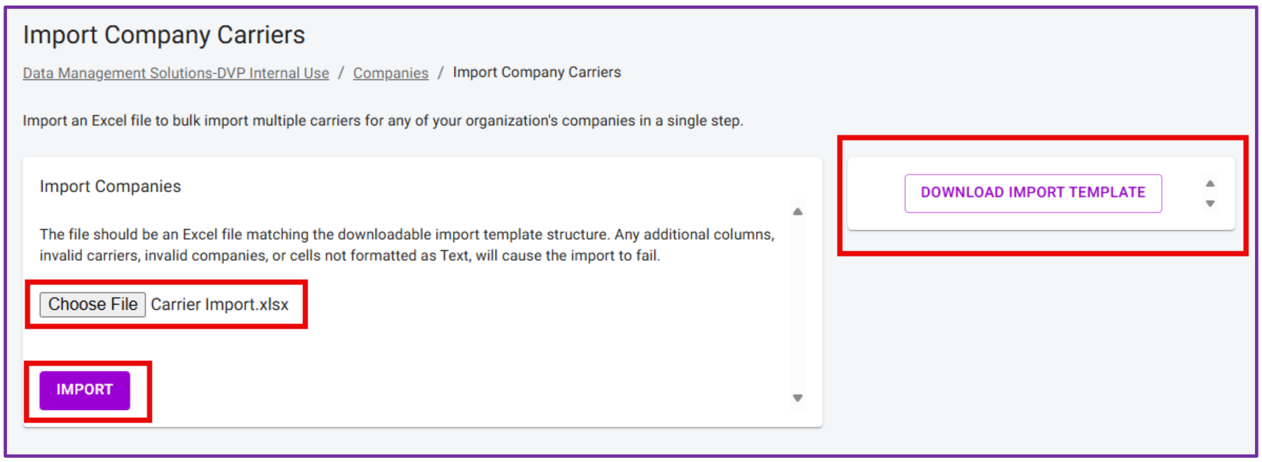


Using the provided import template, complete all required fields:

- 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)]() (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)

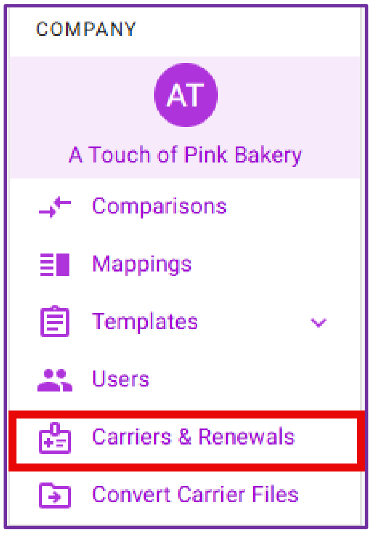
- Carrier Contact Phone Number (Optional)
- Notes (Optional)
- Secondary Carrier Contact Name (Optional)
- Secondary Carrier Contact Email (Optional)
- Secondary Carrier Contact Phone Number (Optional)
- Audit Service (Optional)
- Organization Eligibility Contact Username (Optional)
- Organization Audit Contact Username (Optional)

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

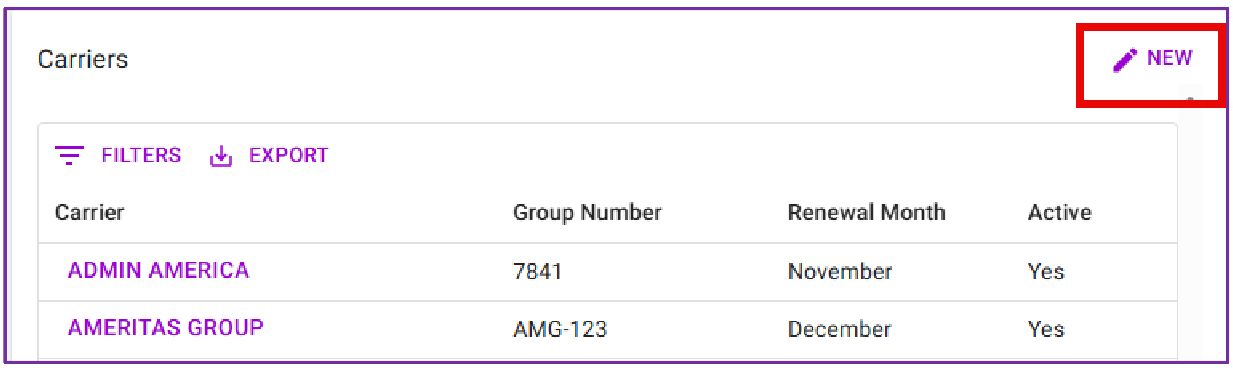


Manually add Carriers

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

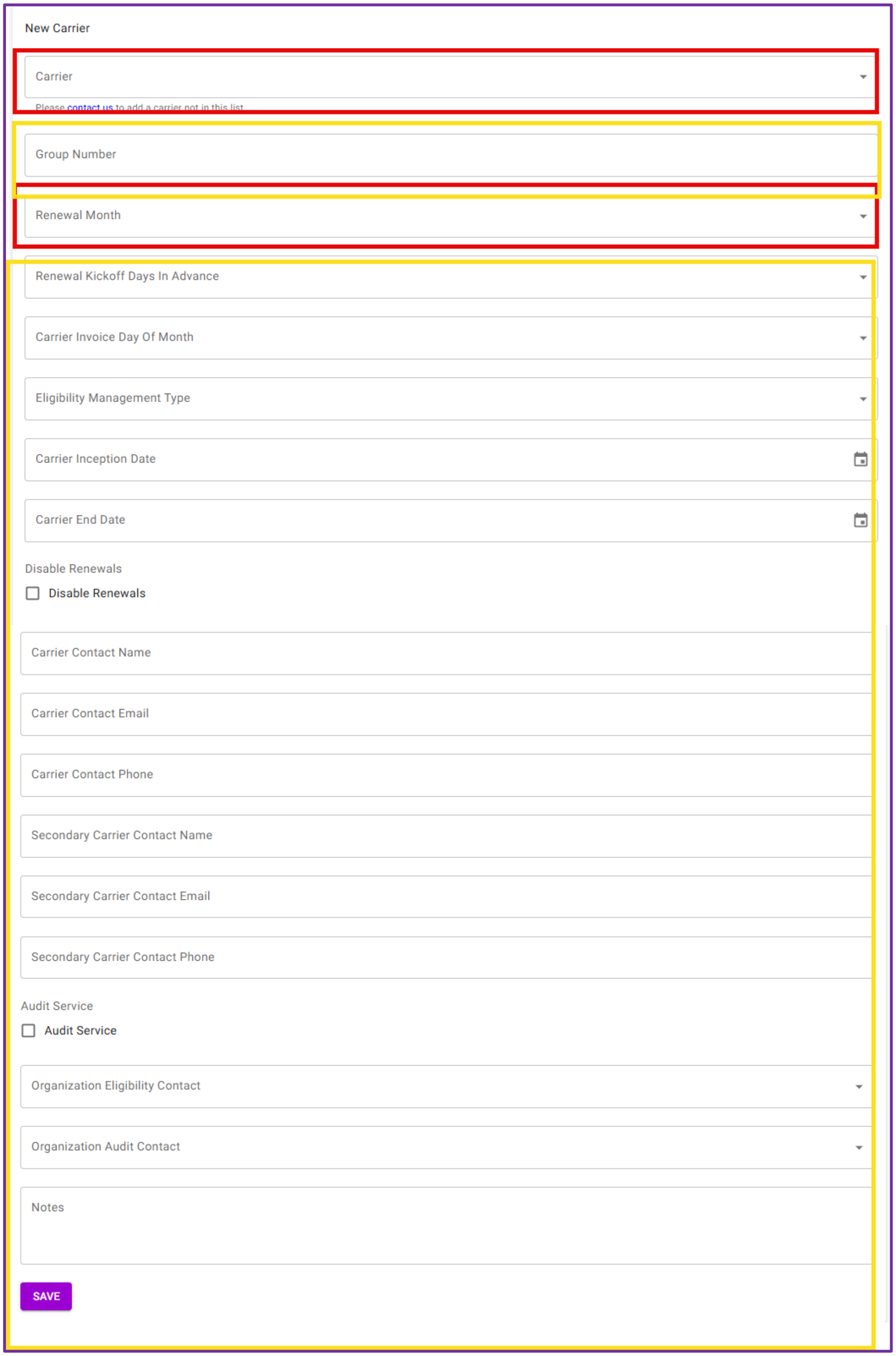


Click NEW



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.


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)

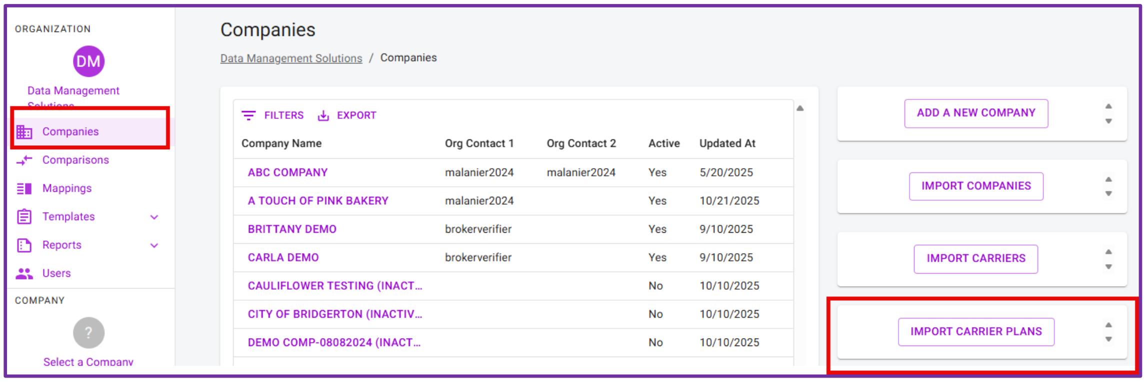
Carrier plan information tracking, however, is only available through the Platinum Elite or Subscription Based Audits subscription plans.

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)

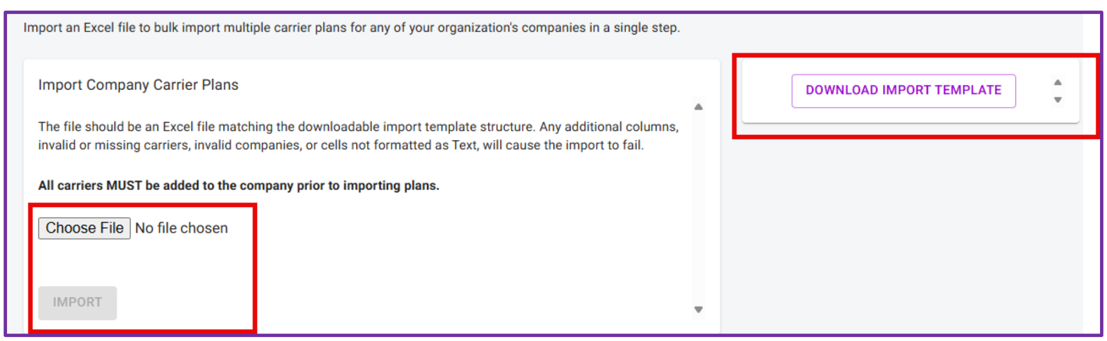
The Import Carriers button can be found on the Organization level under the Companies page.



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)

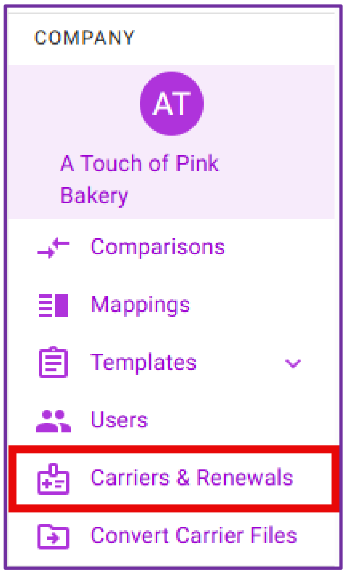
The completed template can then be selected using the Choose File button and then IMPORT.



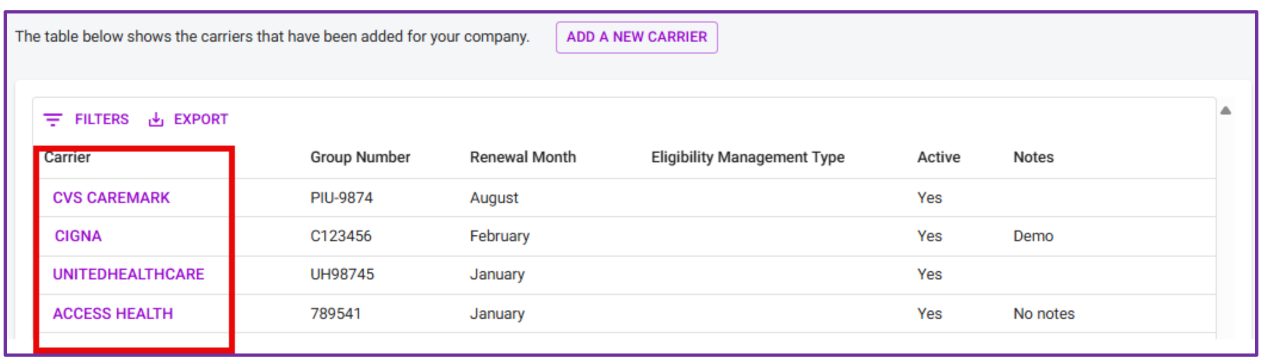
Carriers must be added to each company before importing plans. You may also import multiple plans across multiple carriers and companies in a single import

Manually Add Plan

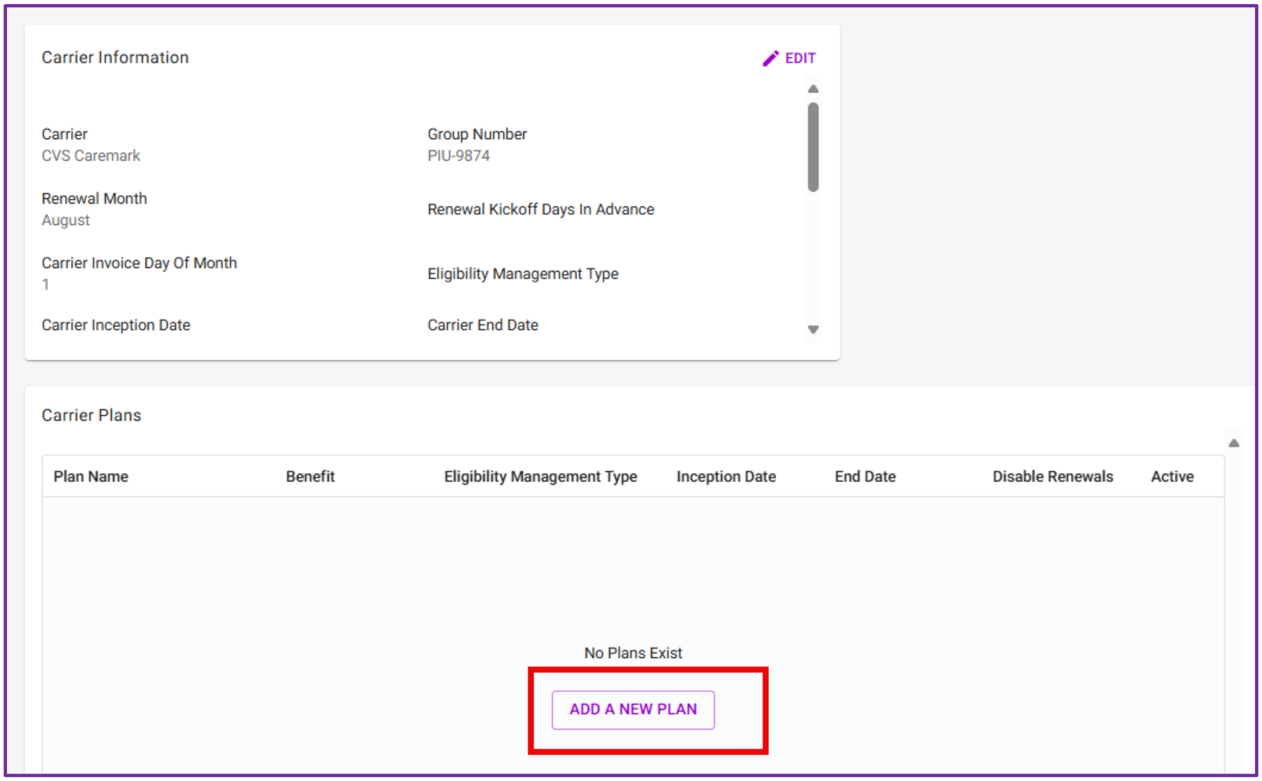
Plan information can be manually added on the Company level by selecting Carriers & Renewals from the left menu.

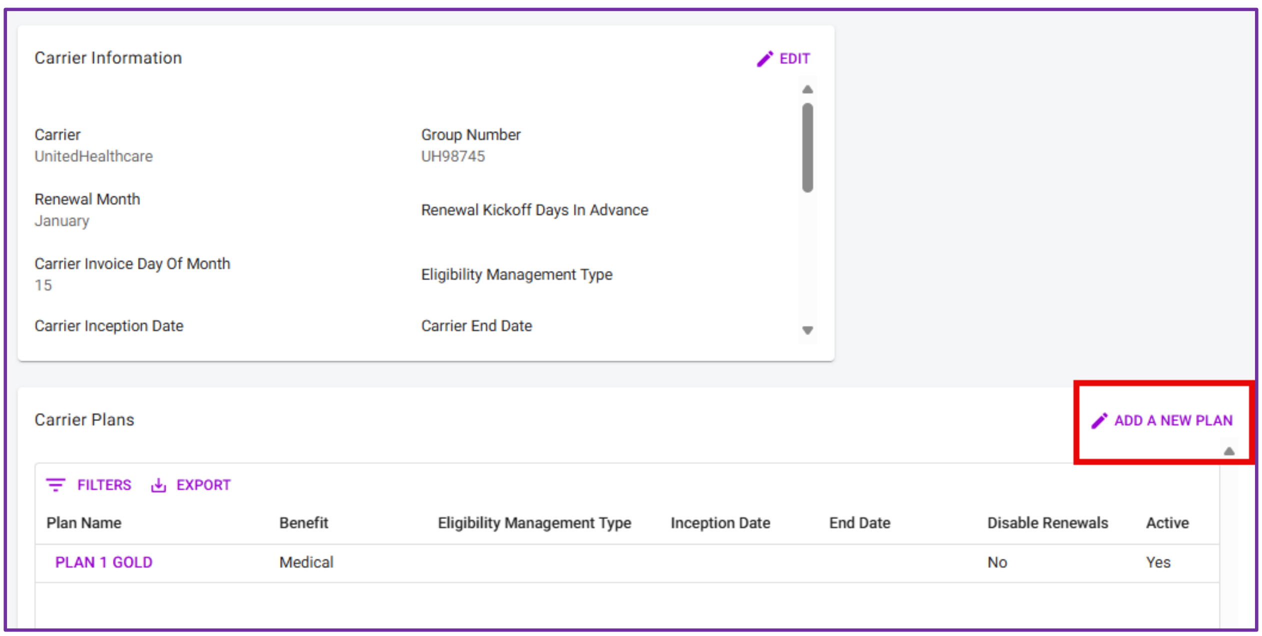


Select the carrier that you would like to add a plan to. Please note that the carrier has to be added prior to adding a plan.

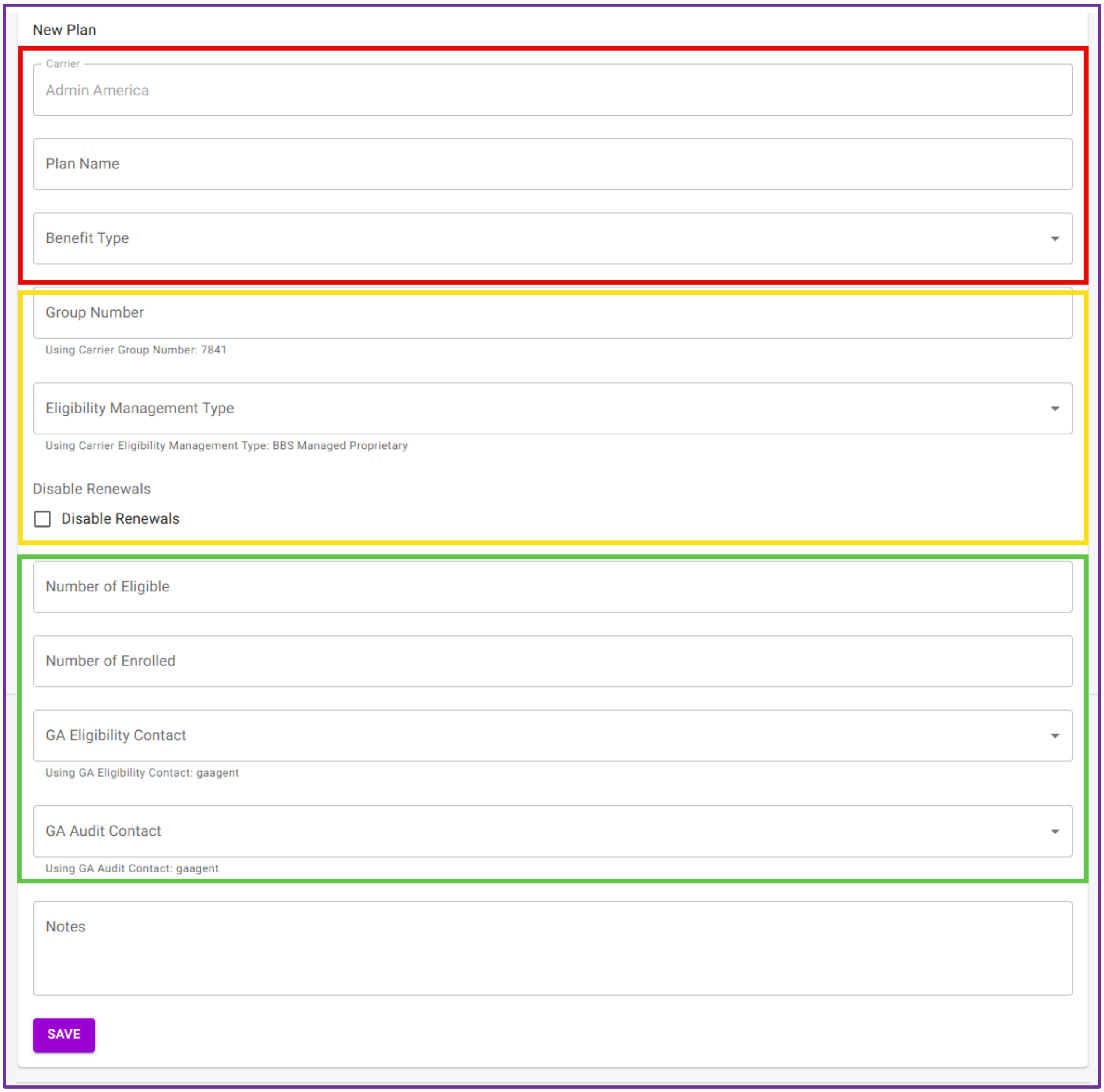


Click ADD A NEW PLAN. The location of ADD A NEW PLAN will vary if there are existing plans under the carrier.





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.



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

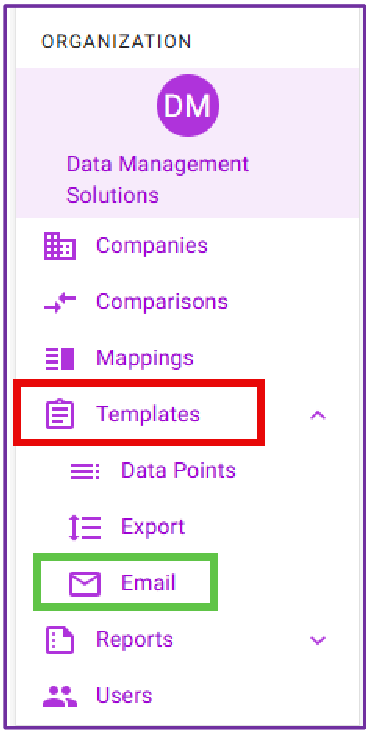
The Data Management Solutions application has customized emails for verifiers and auditors at both the organization and company levels. Please note that Email customization is only available on the Platinum Elite and Subscription Based Audits plans.

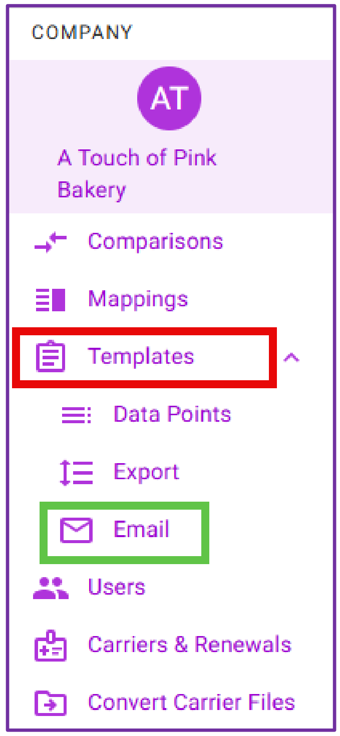
Key Features:

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.

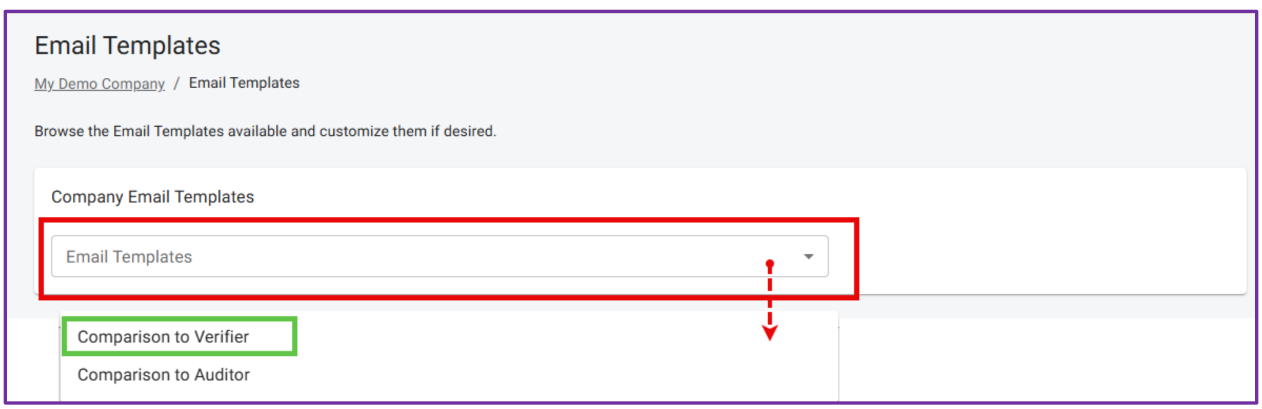
Verifier Email

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

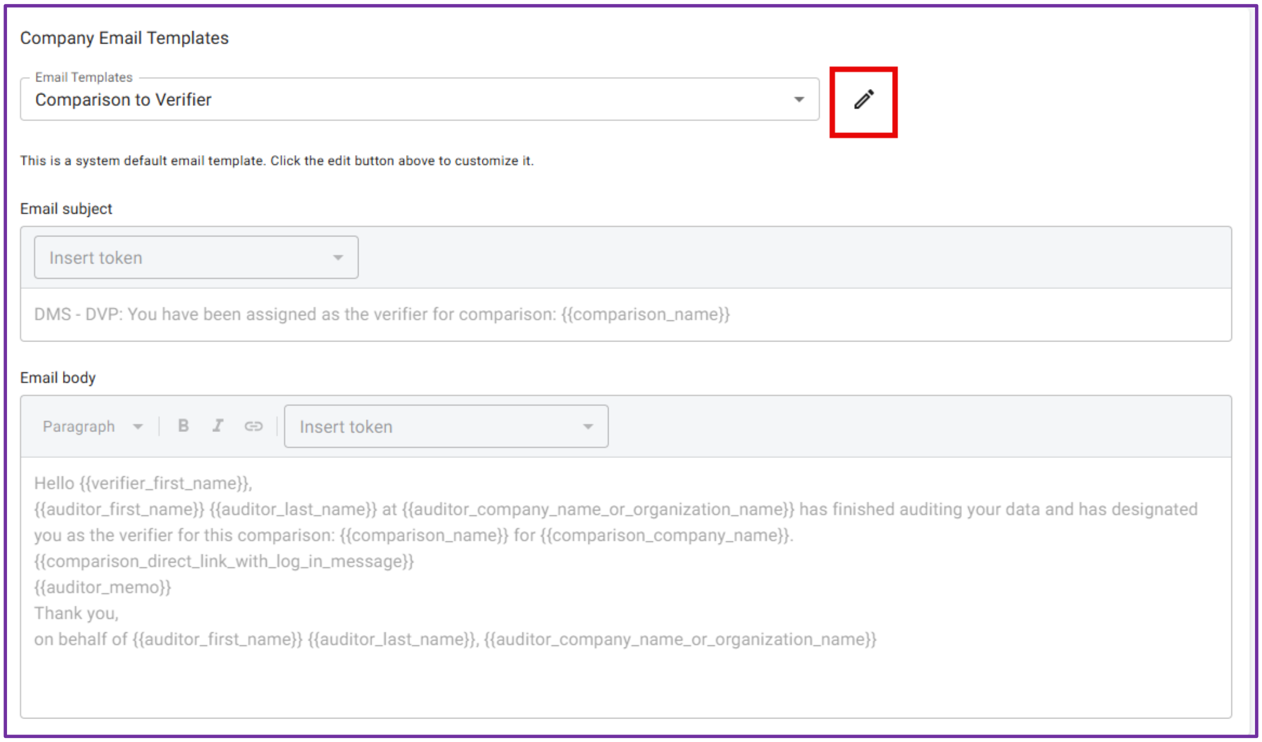


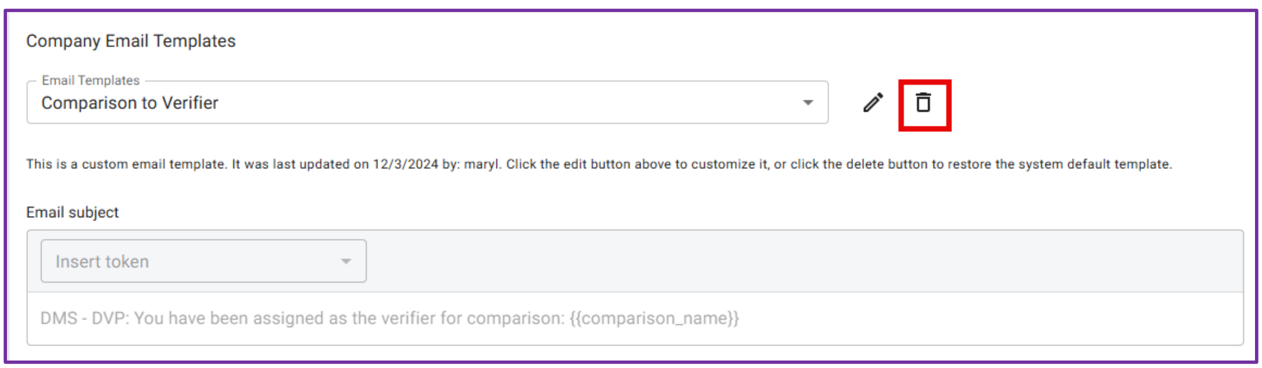


Select COMPARISION TO VERIFIER from the dropdown menu



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



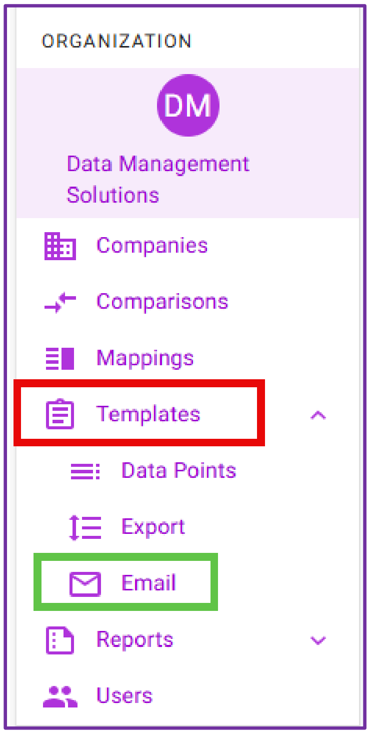


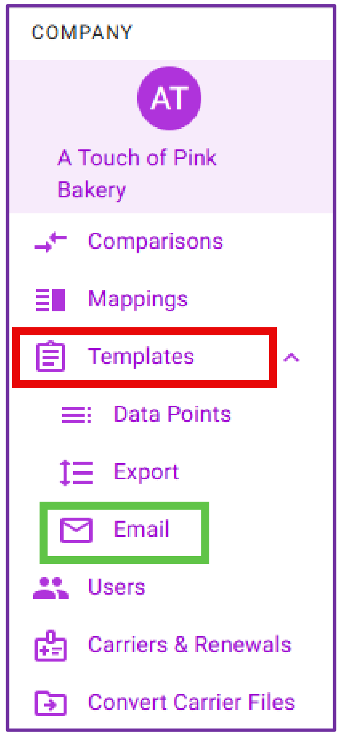
Add customized language to the subject line as well as the body. Tokens are available as well and can be added to the email.

Click SAVE once customized.

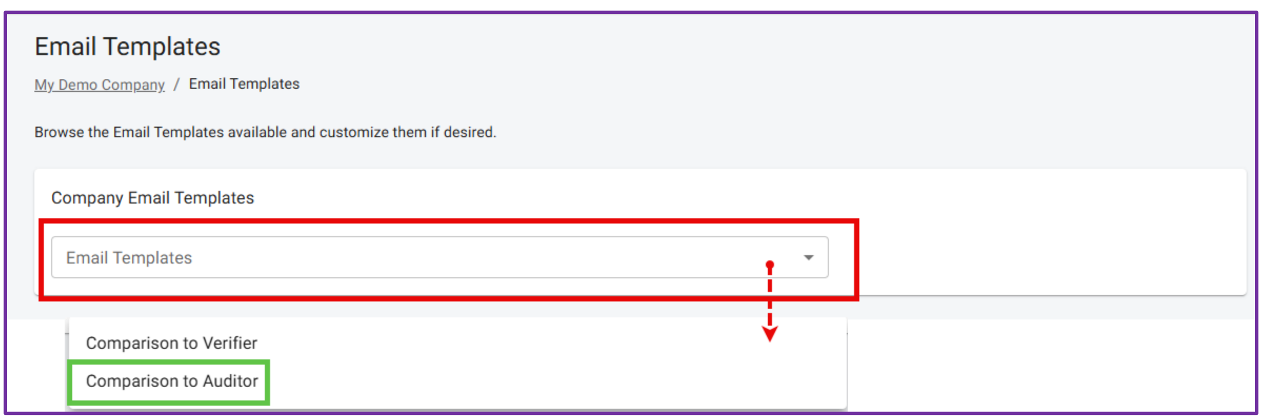
Auditor Email

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

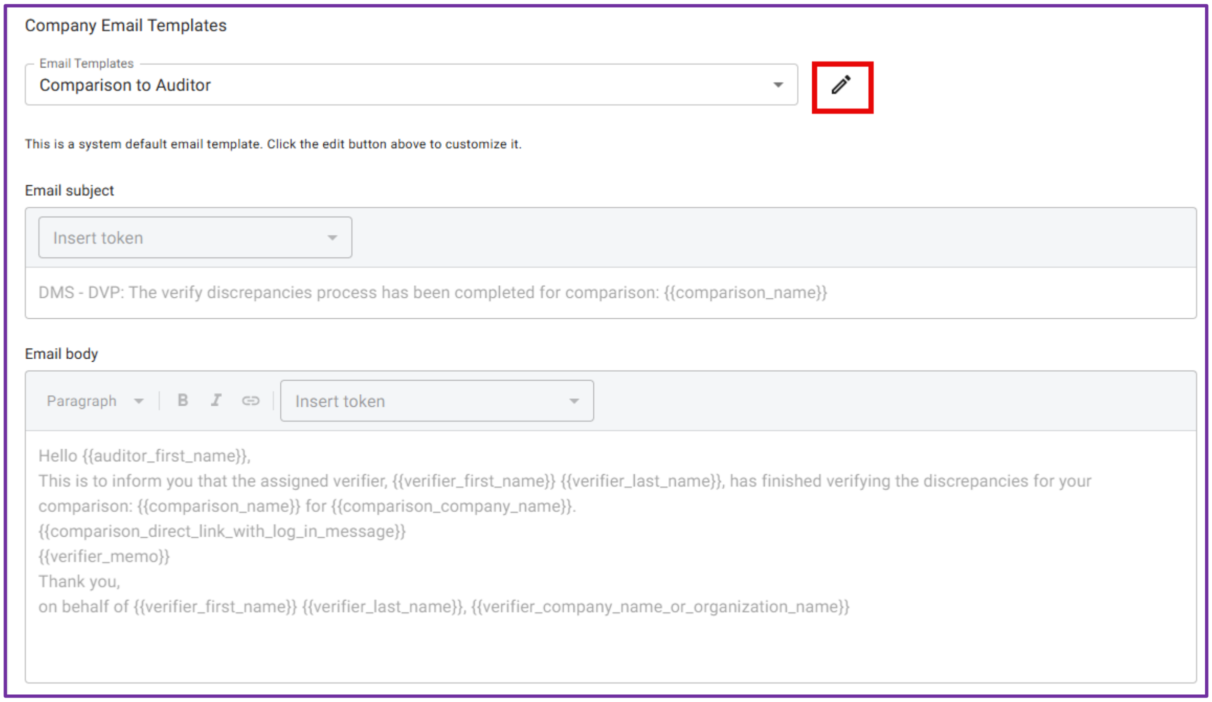


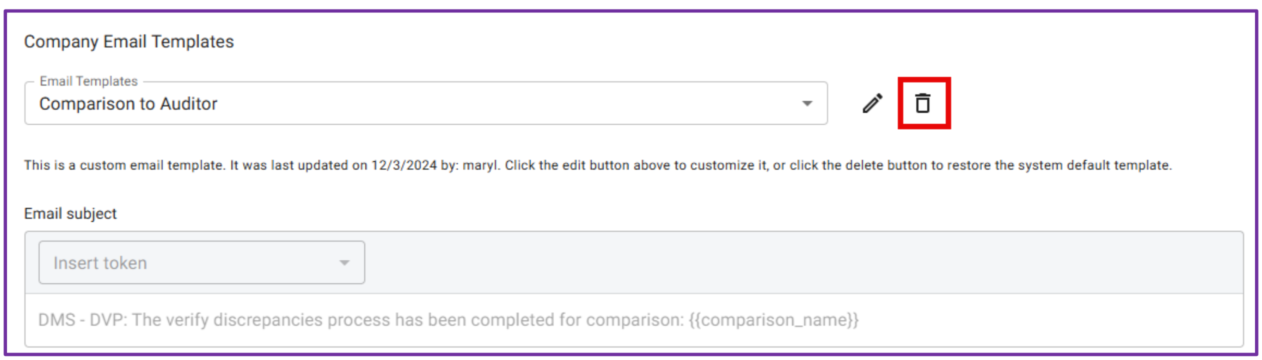


Select COMPARISION TO AUDITOR from the dropdown menu



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





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.

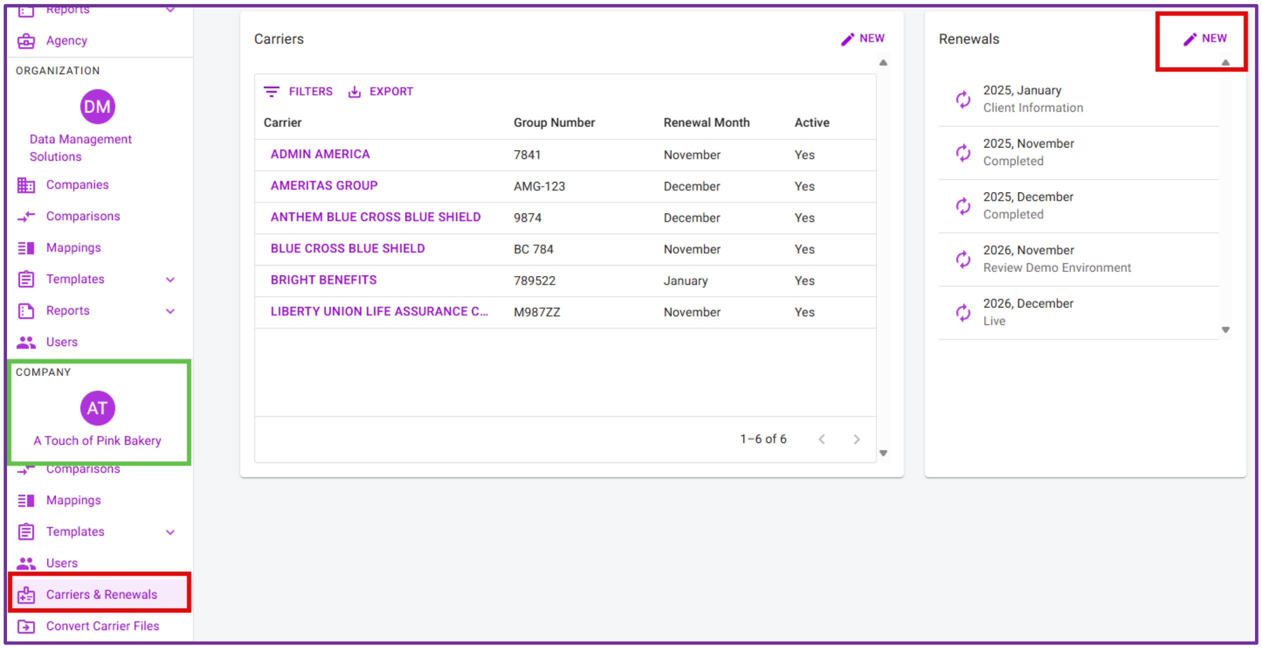
Who Does What?

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.

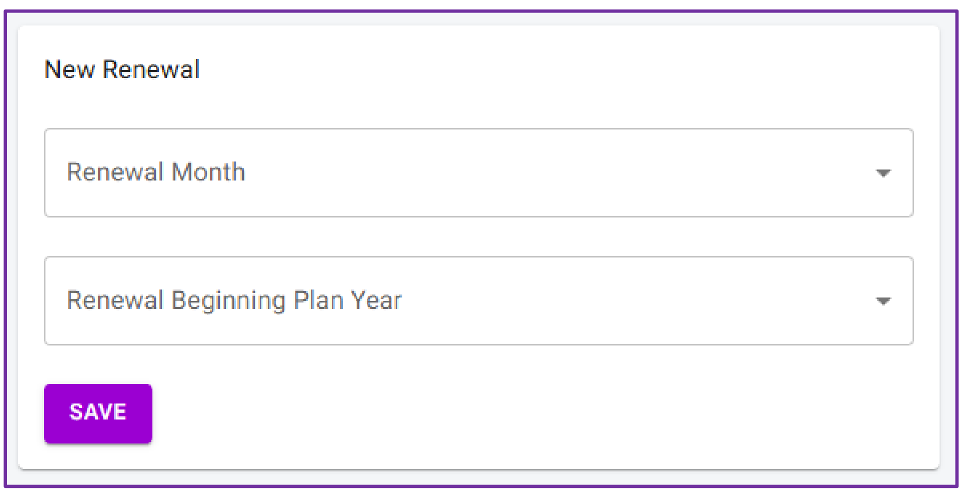
How It Works

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.



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

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

N

notifications@dms-datavalidate.com

To: You

Thu 10/23/2025 9:46 AM

Hello

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.

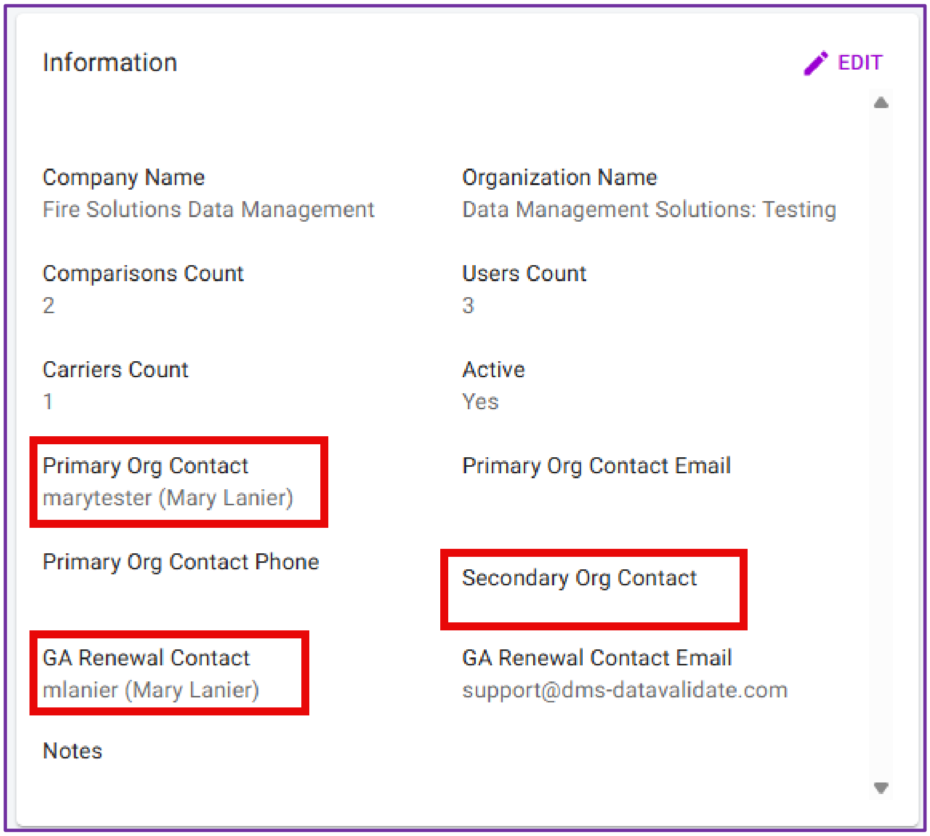
Within the portal, you can upload all relevant plan materials, including (but not limited to) plan documents, rate sheets, and notes on any plan changes.

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.



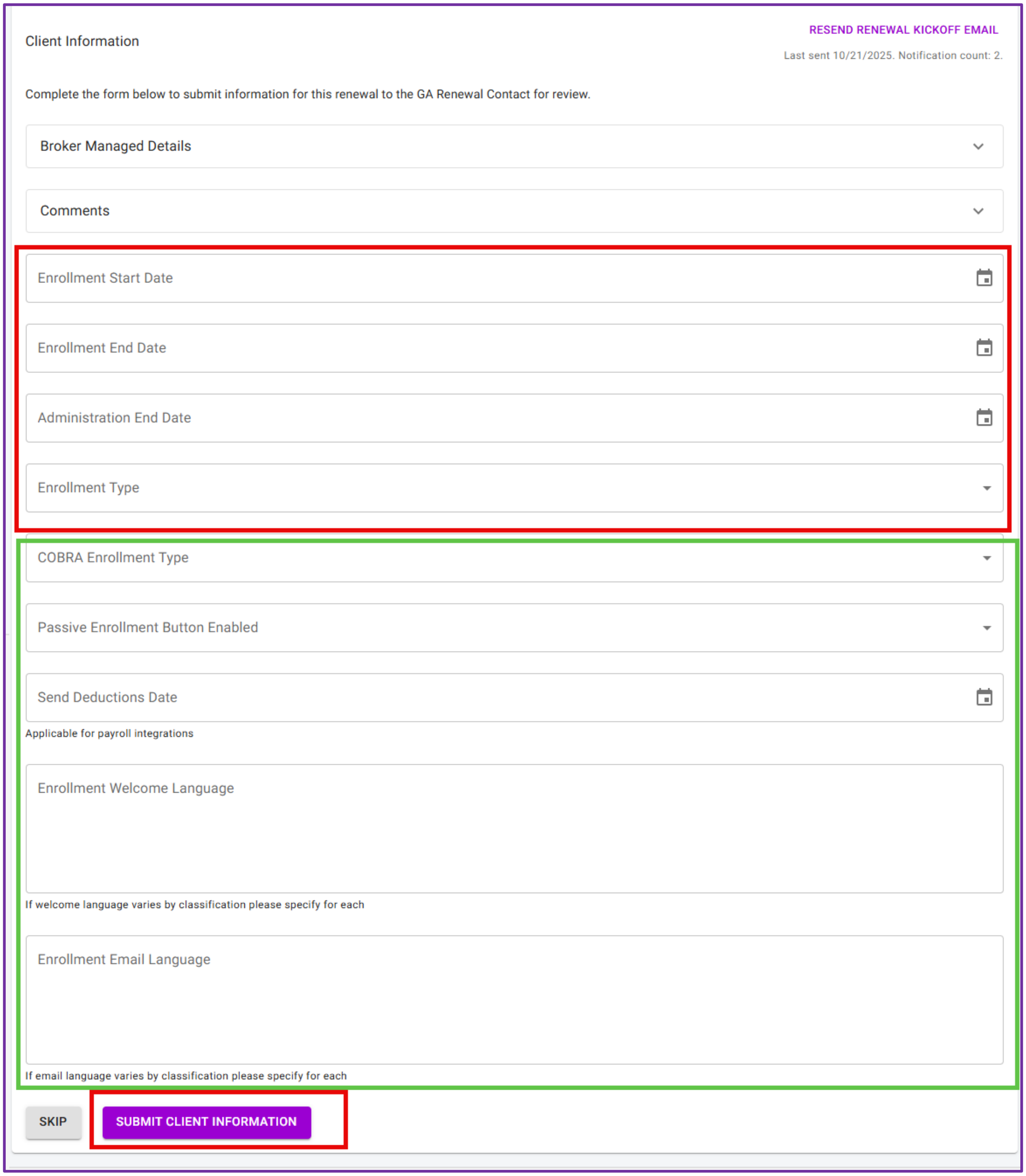
Step 2: Organization Completes Client Information

- 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

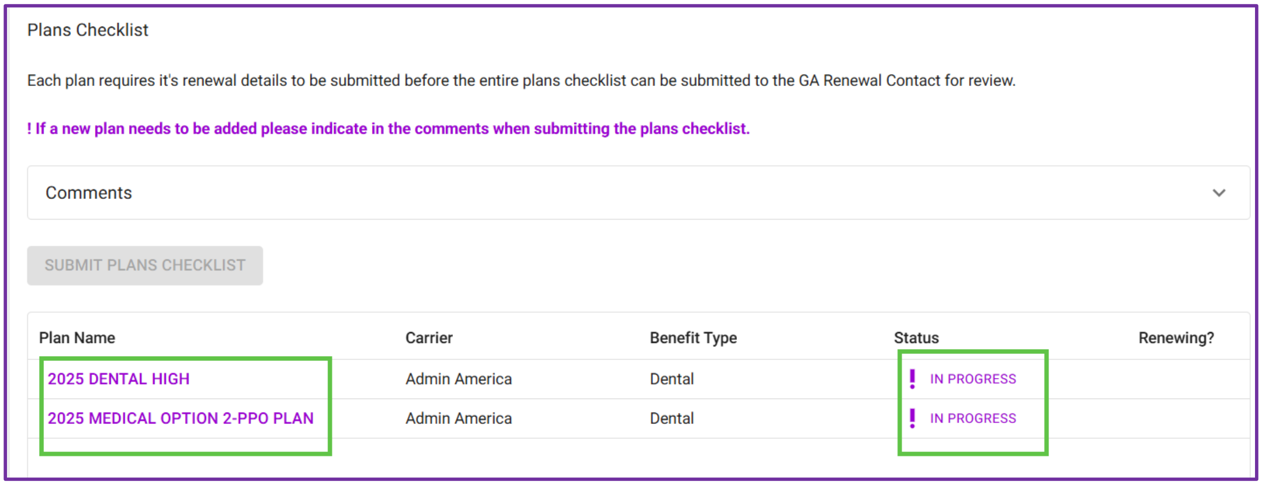
If email language varies by classification please specify for each

SKIP

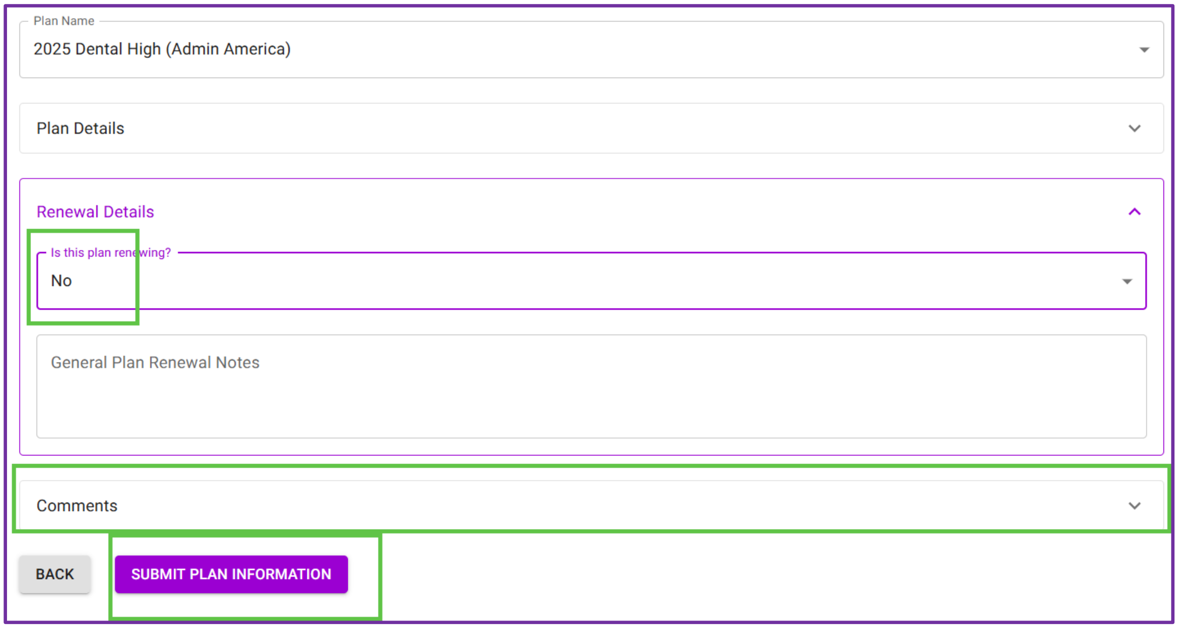
SUBMIT CLIENT INFORMATION

Step 3: Organization Completes Plans Checklist

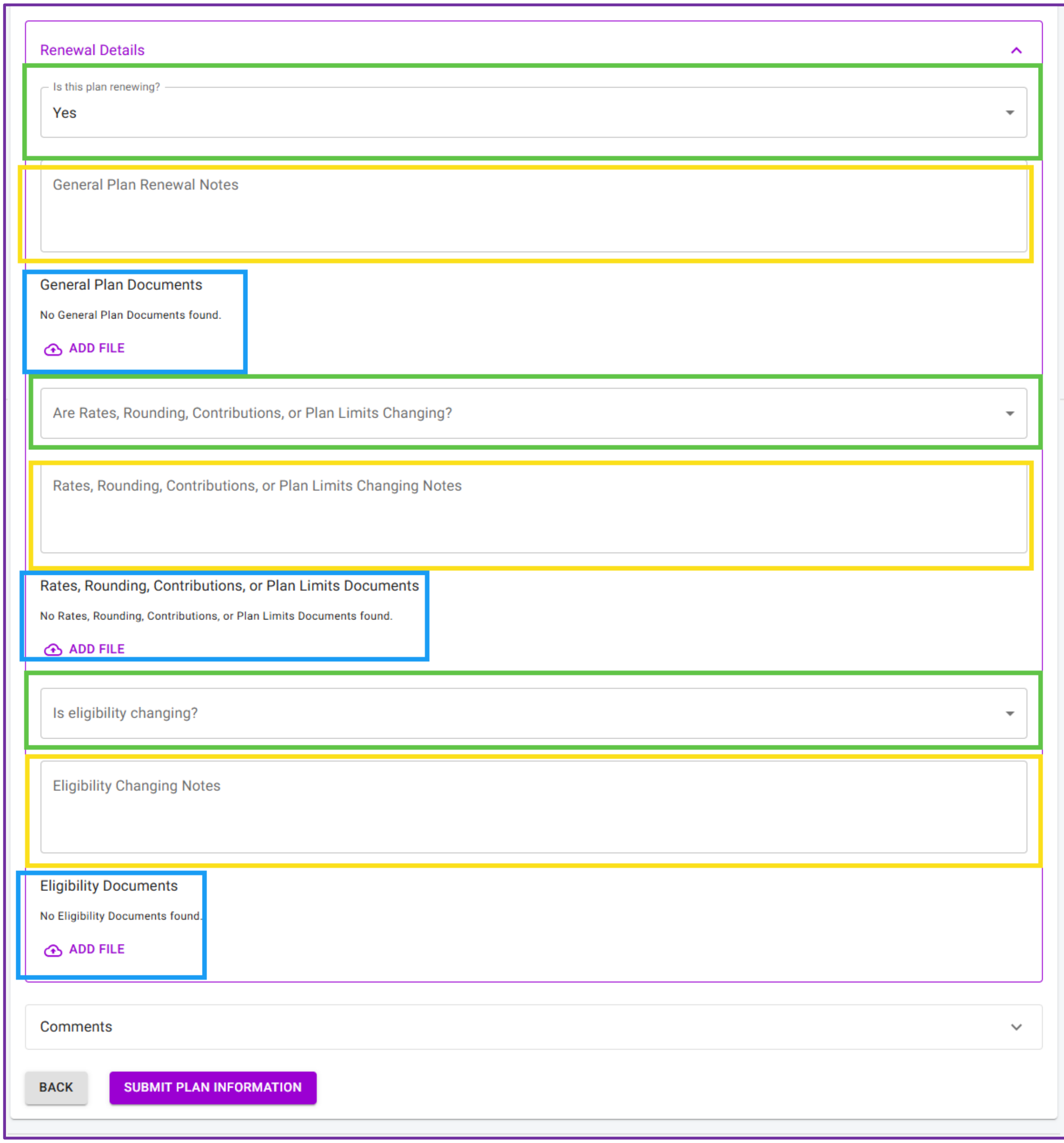
- For each listed plan click the **Plan Name** or **Status** to review:



  - 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).

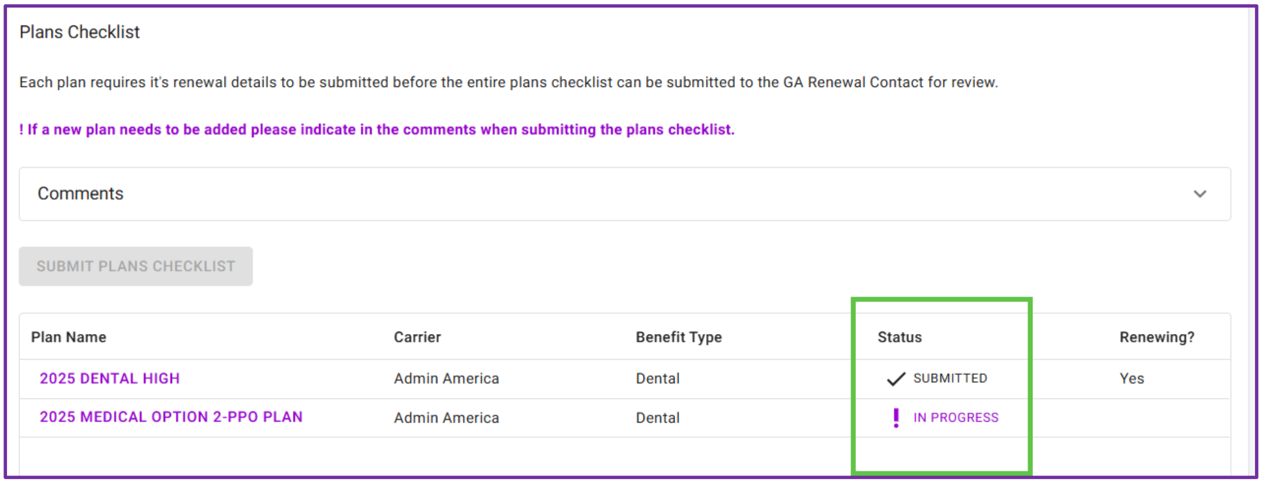


- If **renewing** →
  - Answer additional questions for the rates, rounding, limits, contributions section, and the eligibility section.
- Upload supporting documents as needed
- Add additional pertinent information in the Comment section

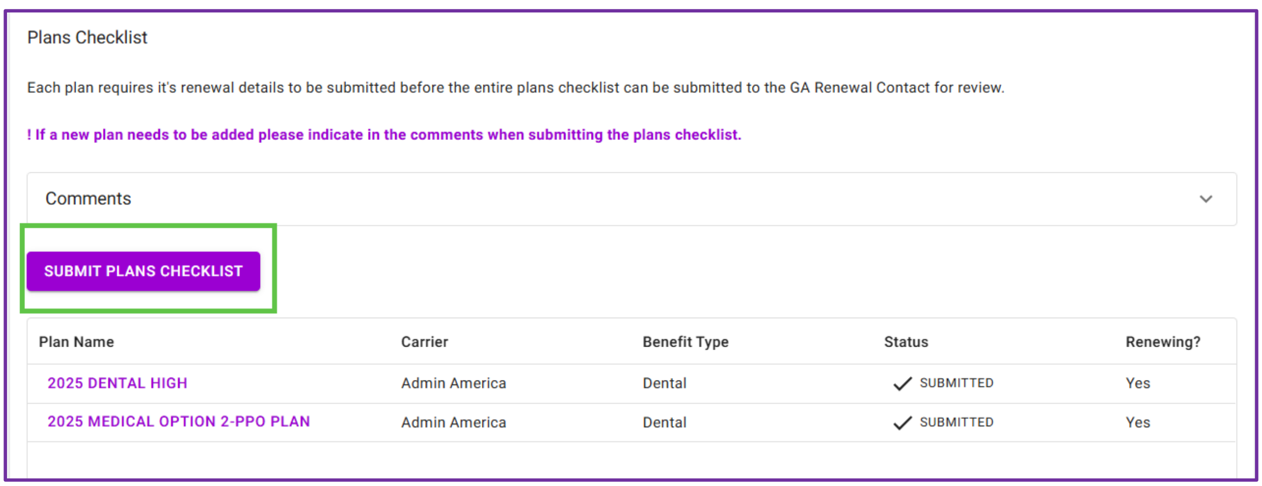


- Click **SUBMIT PLAN INFORMATION** once all selections have been made for the specific plan.

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



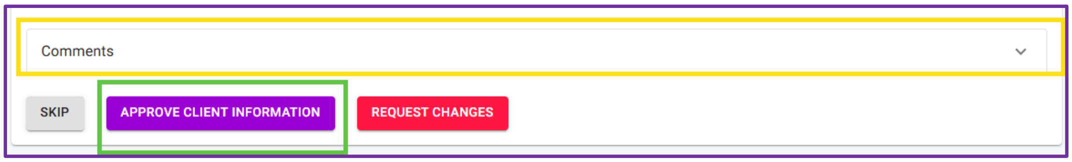
- Once all plans are submitted, click **Submit Plans Checklist** → GA is notified by an email.



Step 4: GA Reviews & Collaborates

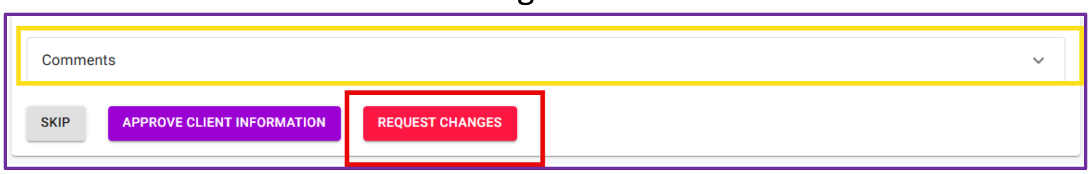
- GA will receive an email when the Organization contact completes the Client Information and/or Plans Checklist.
    - **GA Review Client Information – Approval**

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**.



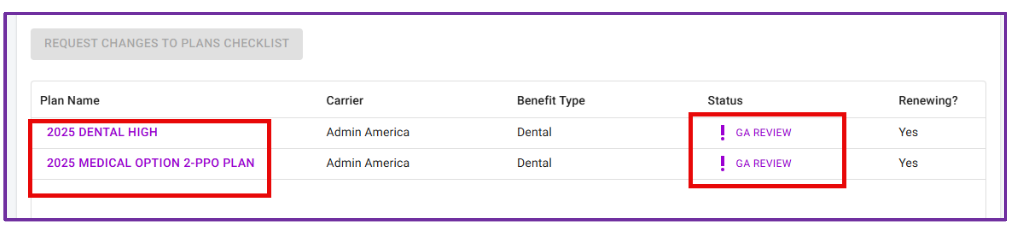
- **GA Review Client Information – Request Changes**

  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

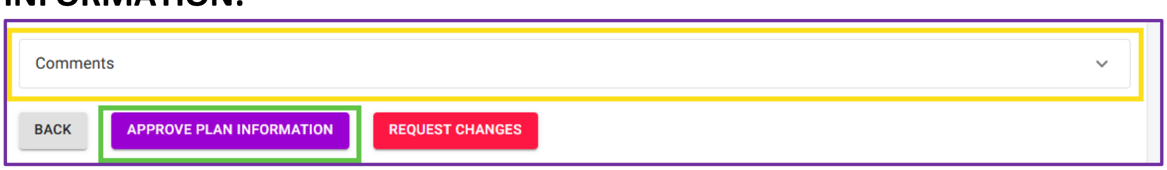


- **GA Review Plans Checklist – Approval**

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

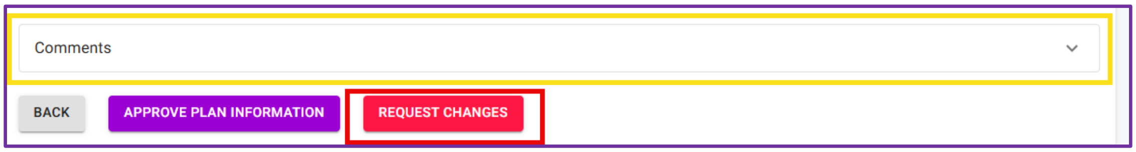


If all required information and documents have been provided by the organization contacts and no further details are needed, the GA should add any desired comments and then click **APPROVE PLAN INFORMATION.**



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

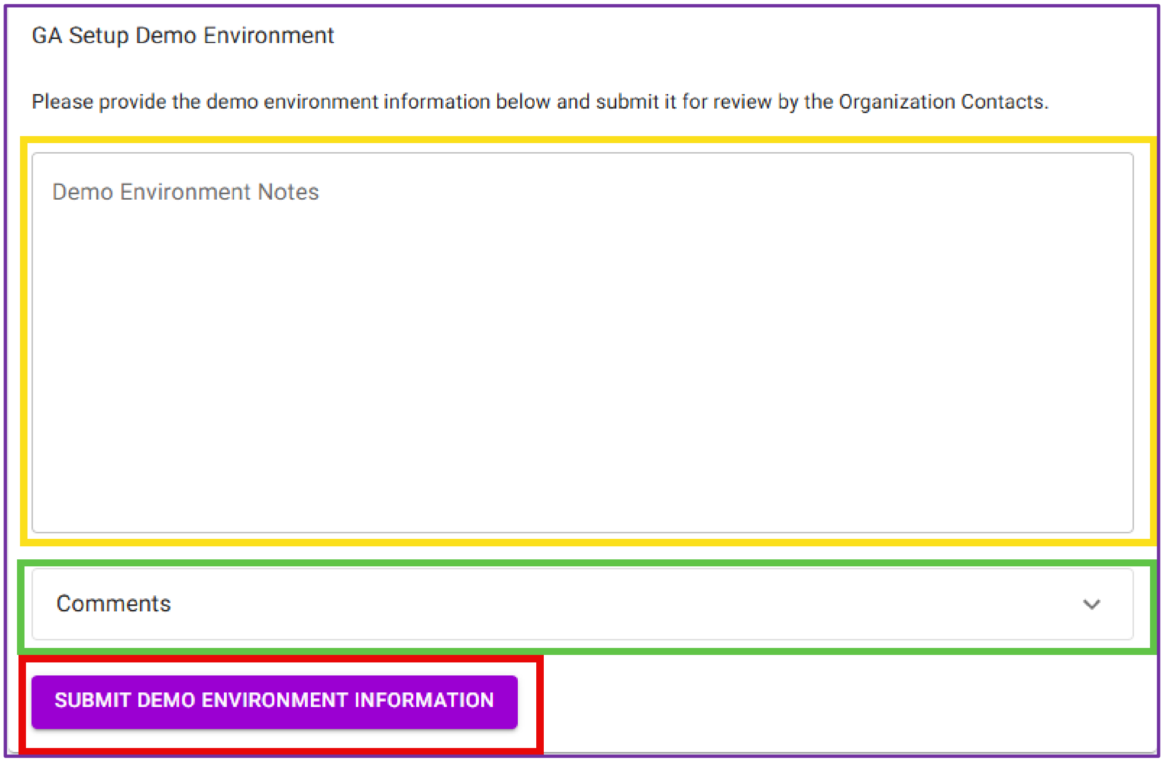
  If additional information or clarification is needed, the GA should add a comment and then click **REQUEST CHANGES**. This will send an email with the comment to the organization contacts

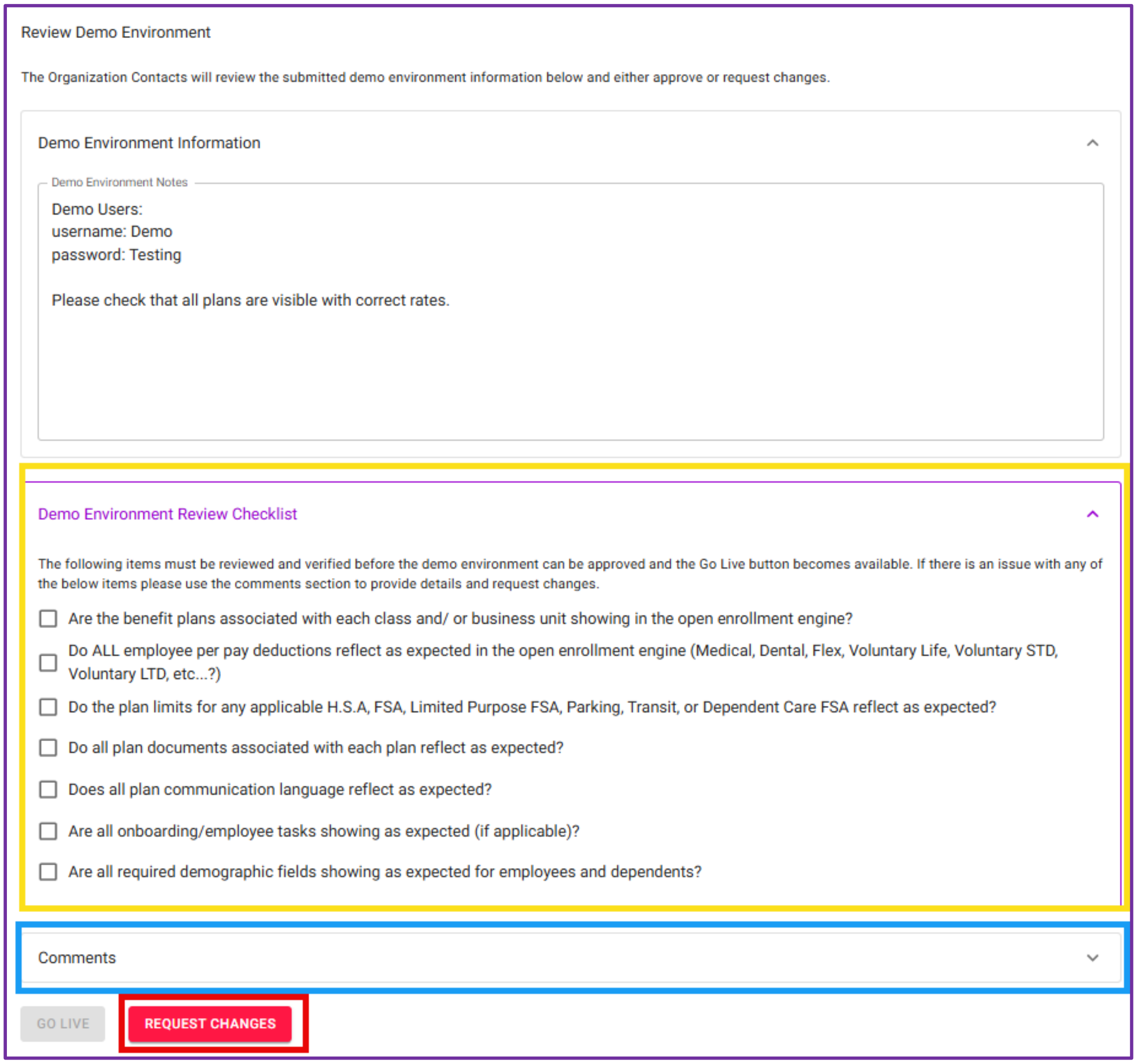
- When all plans have been approved, click **APPROVE PLANS CHECKLIST**.
- Collaboration continues until both steps are approved.

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.



- 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).


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

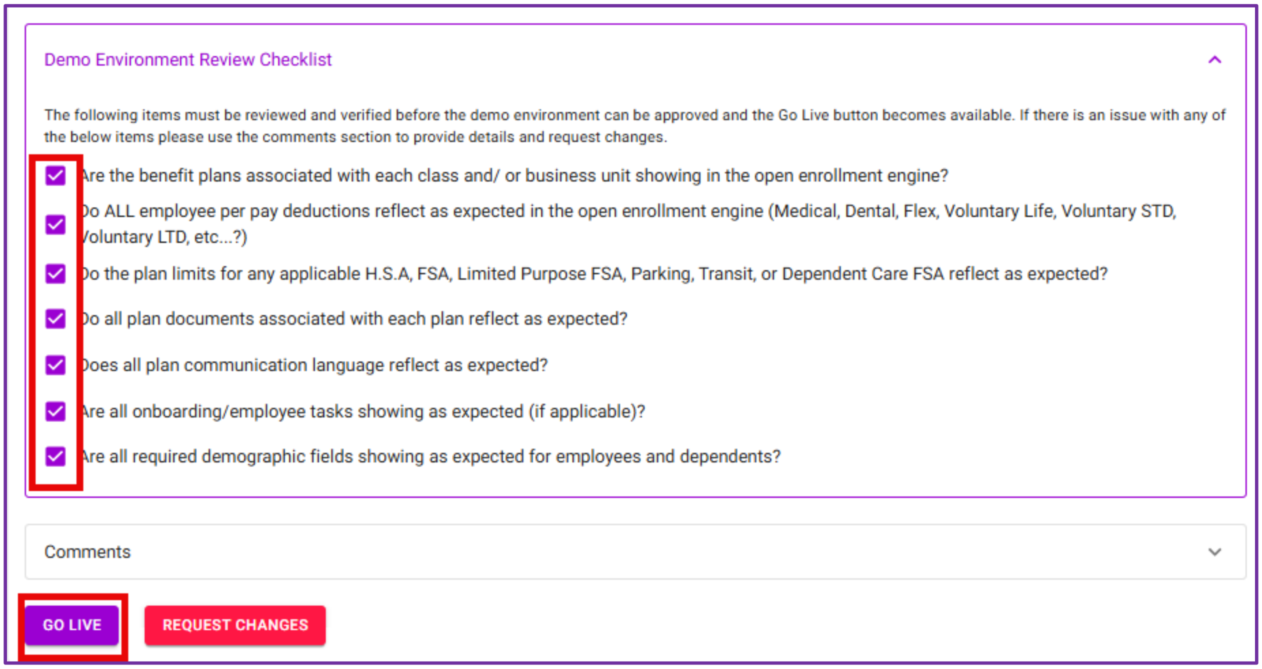
The following items must be reviewed and verified before the demo environment can be approved and the Go Live button becomes available. If there is an issue with any of the below items please use the comments section to provide details and request changes.

- [ ] 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

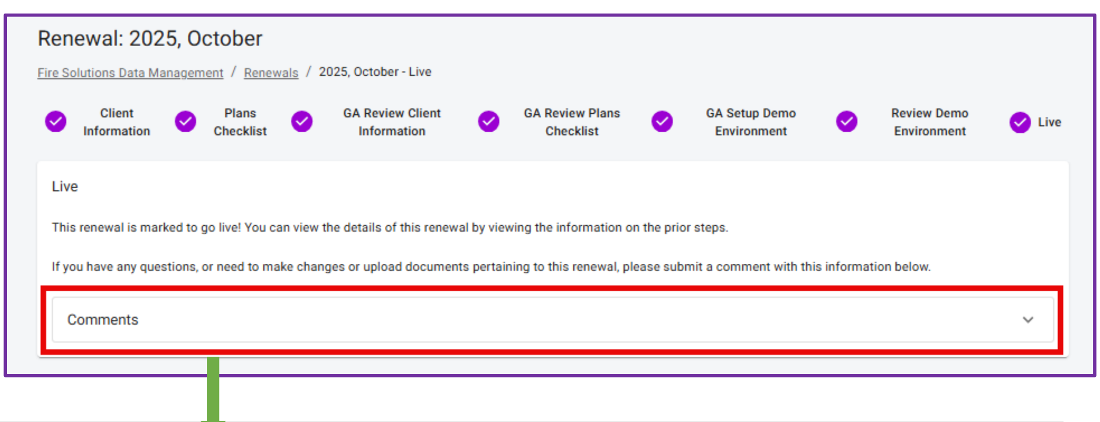
REQUEST CHANGES

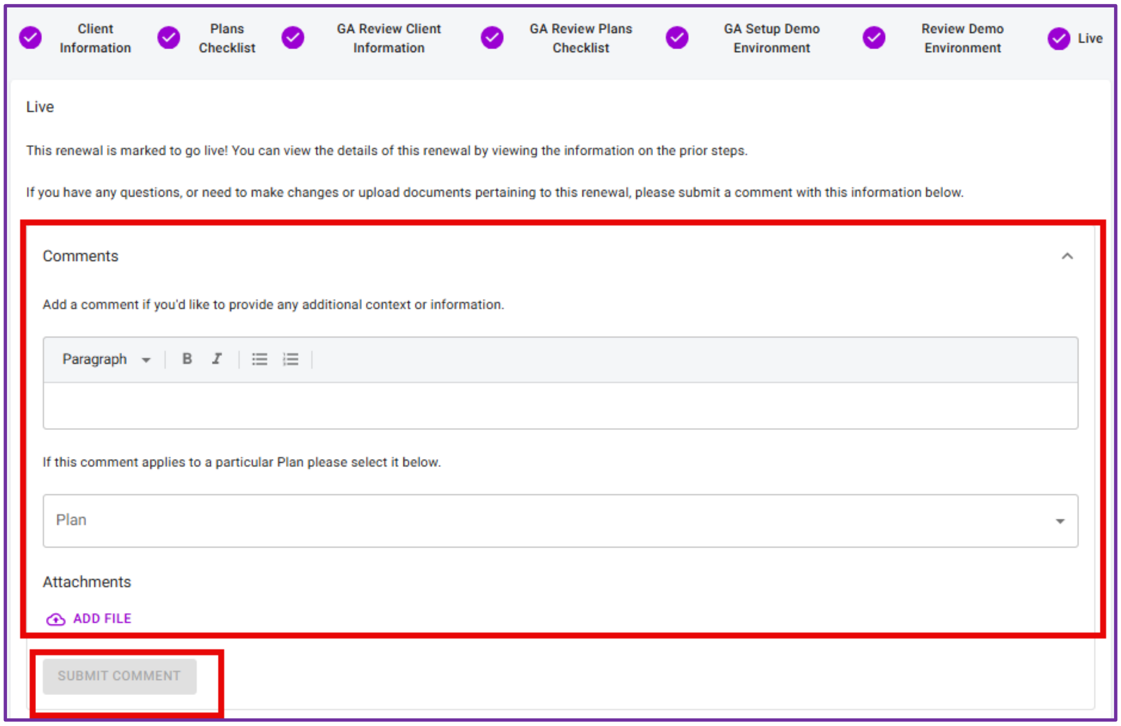


Step 7: Renewal Completion

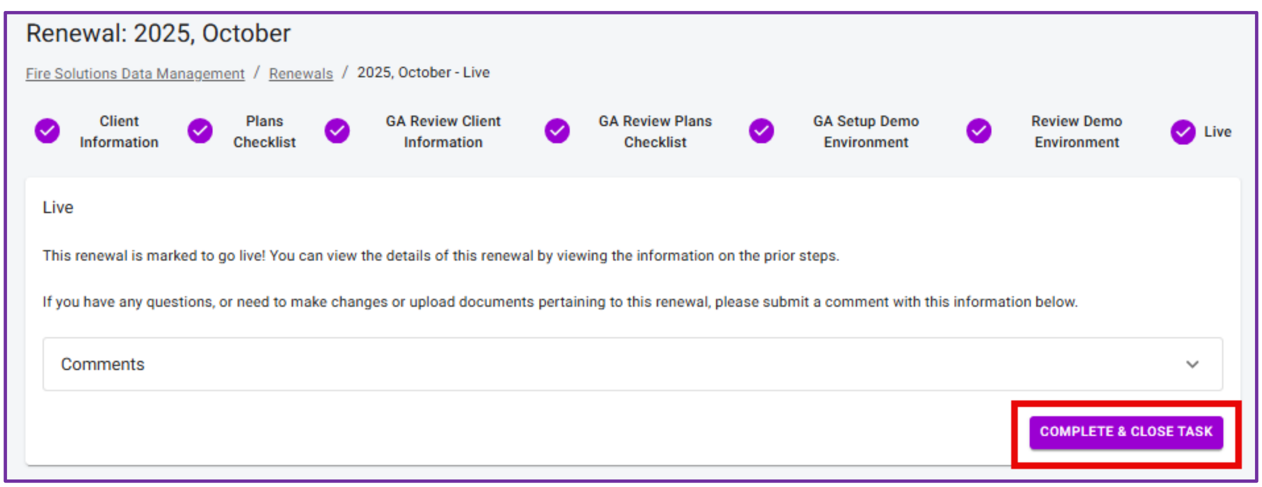
- Once live, the renewal is **locked**—previous steps cannot be reopened.
- Post-Go Live:

  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.





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



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

✅ 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.

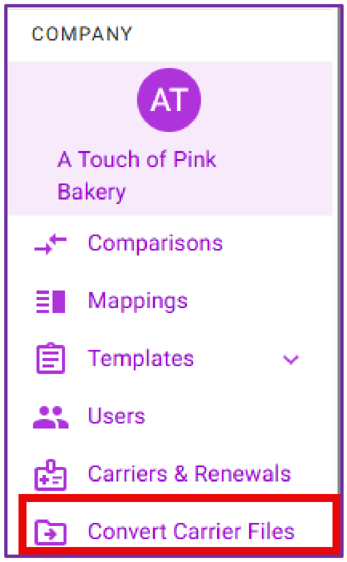
What This Functionality Does:

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.

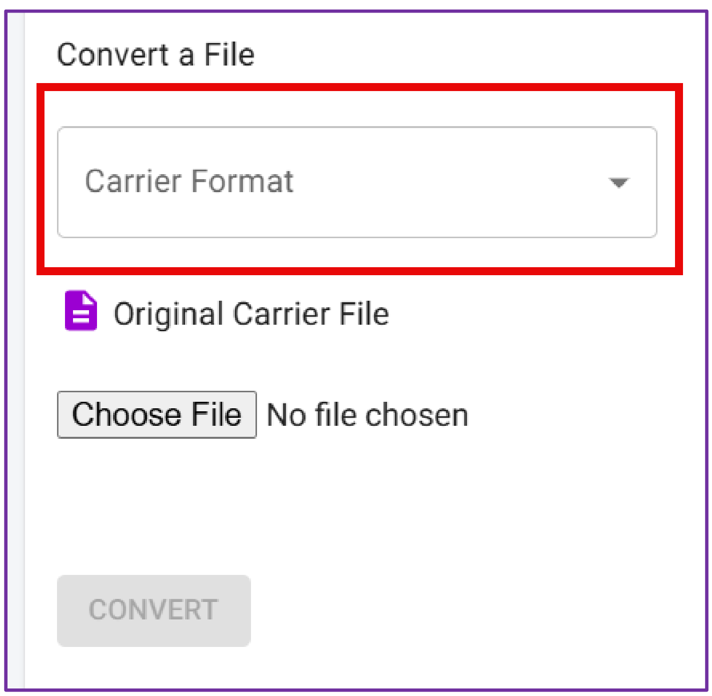
The converted file is then ready for audit use, significantly reducing manual effort and improving efficiency.

To convert a carrier invoice:

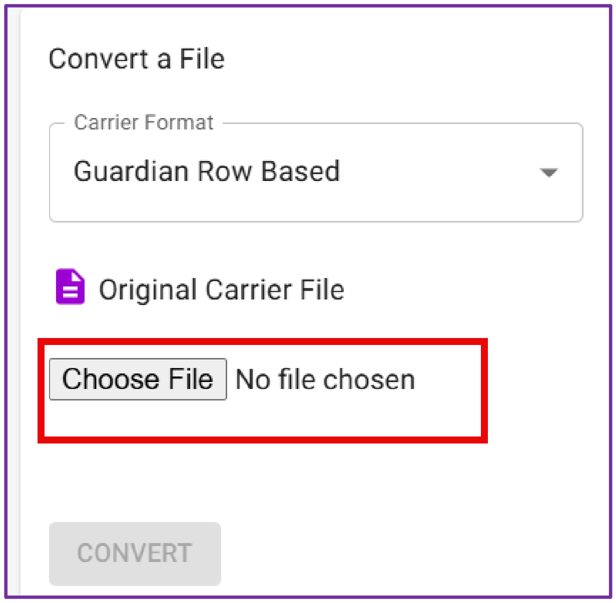
1. Navigate to a company if organization user.
2. Under the company, select Convert Carrier Files in the left-hand menu.



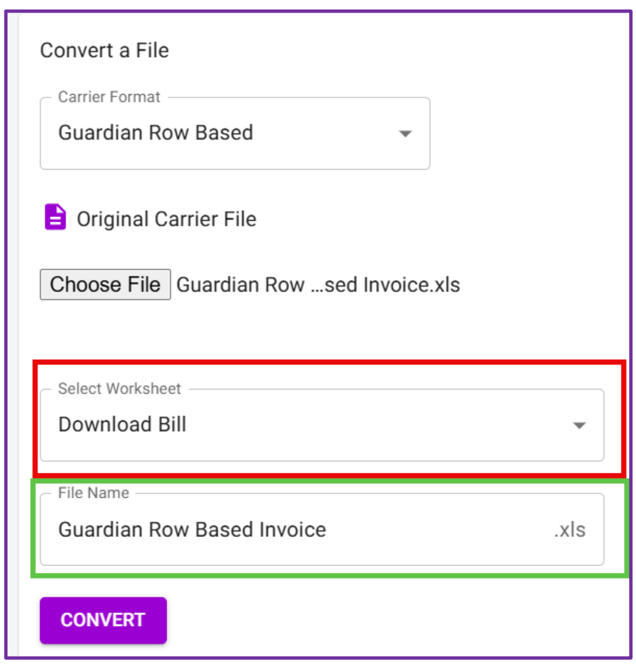
3. Select Carrier Format dropdown and then the applicable carrier file.



4. Click Choose File and select the carrier invoice



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



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

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

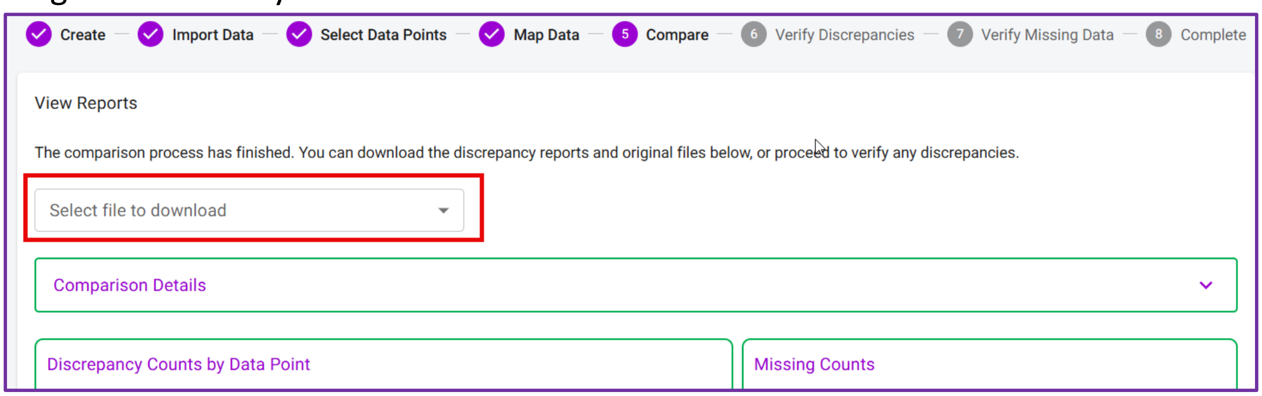
The Data Management Solutions application provides several downloadable reports:

Audit Reports

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

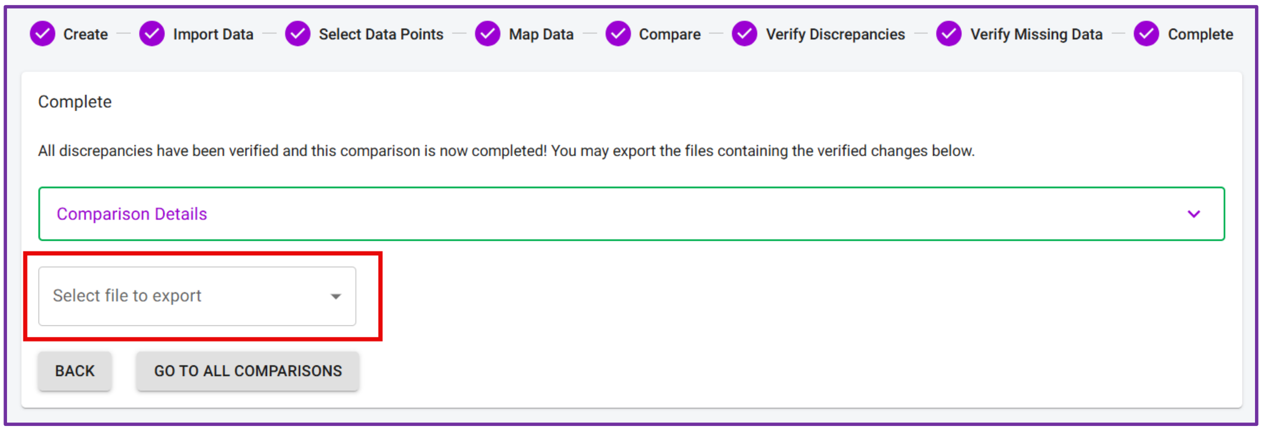
The first set of reports are available on Step 5 Compare:

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



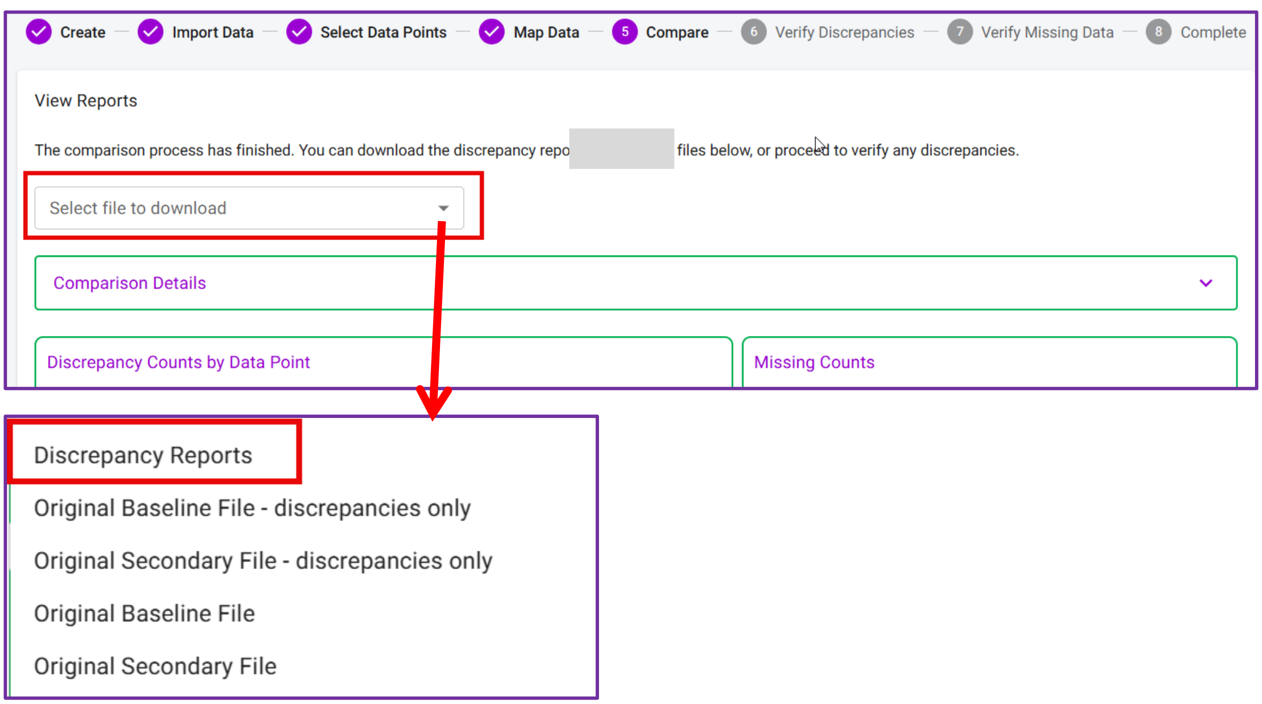
The second set of reports are available on Step 8 Complete

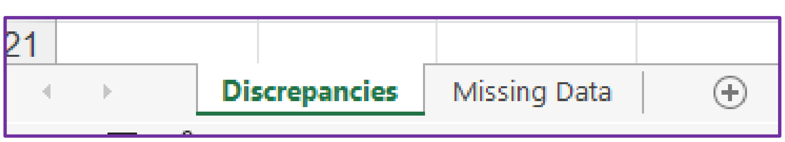
- All Records Including Verified
- Verified Records Only



Discrepancy Report

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





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

These are downloadable reports located on Step 5 – Compare. These reports display all data points within a row from either the baseline or secondary file, regardless of where the discrepancy occurs.

A dedicated discrepancy column is included that highlights the specific data point where the mismatch is found. This additional report is designed for scenarios like imports, and it ensures all relevant data points—alongside the discrepancy—are readily available for further processing.

The new Discrepancy Report can now be accessed in Step 5 Compare within the updated Download Reports dropdown. They are named: Original Baseline File – discrepancies only and Original Secondary File – discrepancies only.

Original Baseline File / Original Secondary File

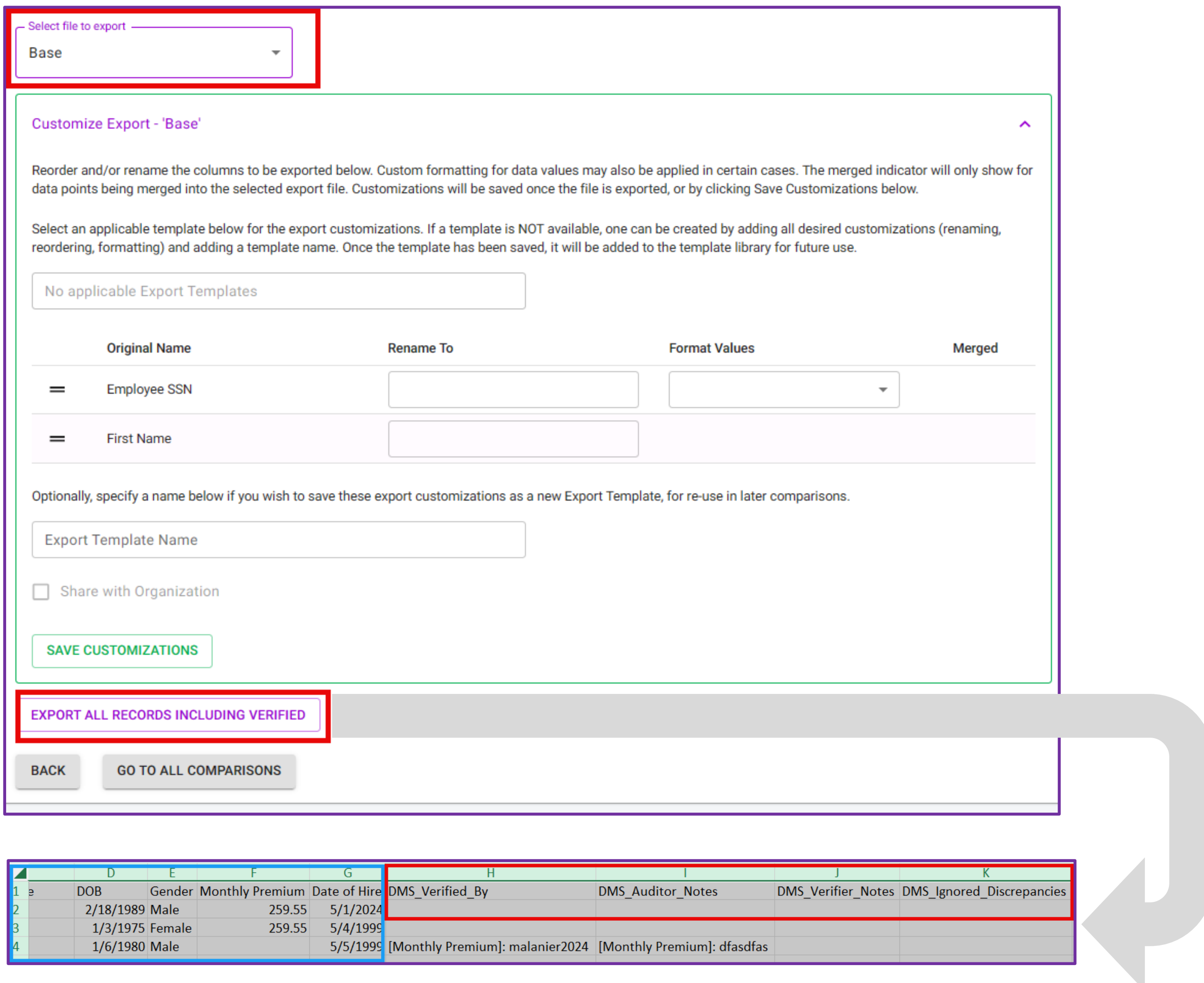
This is a downloadable report located on Step 5 - Compare that contains all data from the original import files prior to mapping and is available for either the baseline or the secondary.

All Records Including Verified

This is a downloadable report located in Step 8 - Complete that contains all records from either the baseline or secondary file including the verified records (discrepancies and missing). The *All Records Including Verified* report also includes 5 additional columns added to the original files:

- DMS_Verified_By

- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type
- DMS_Ignored_Discrepancies

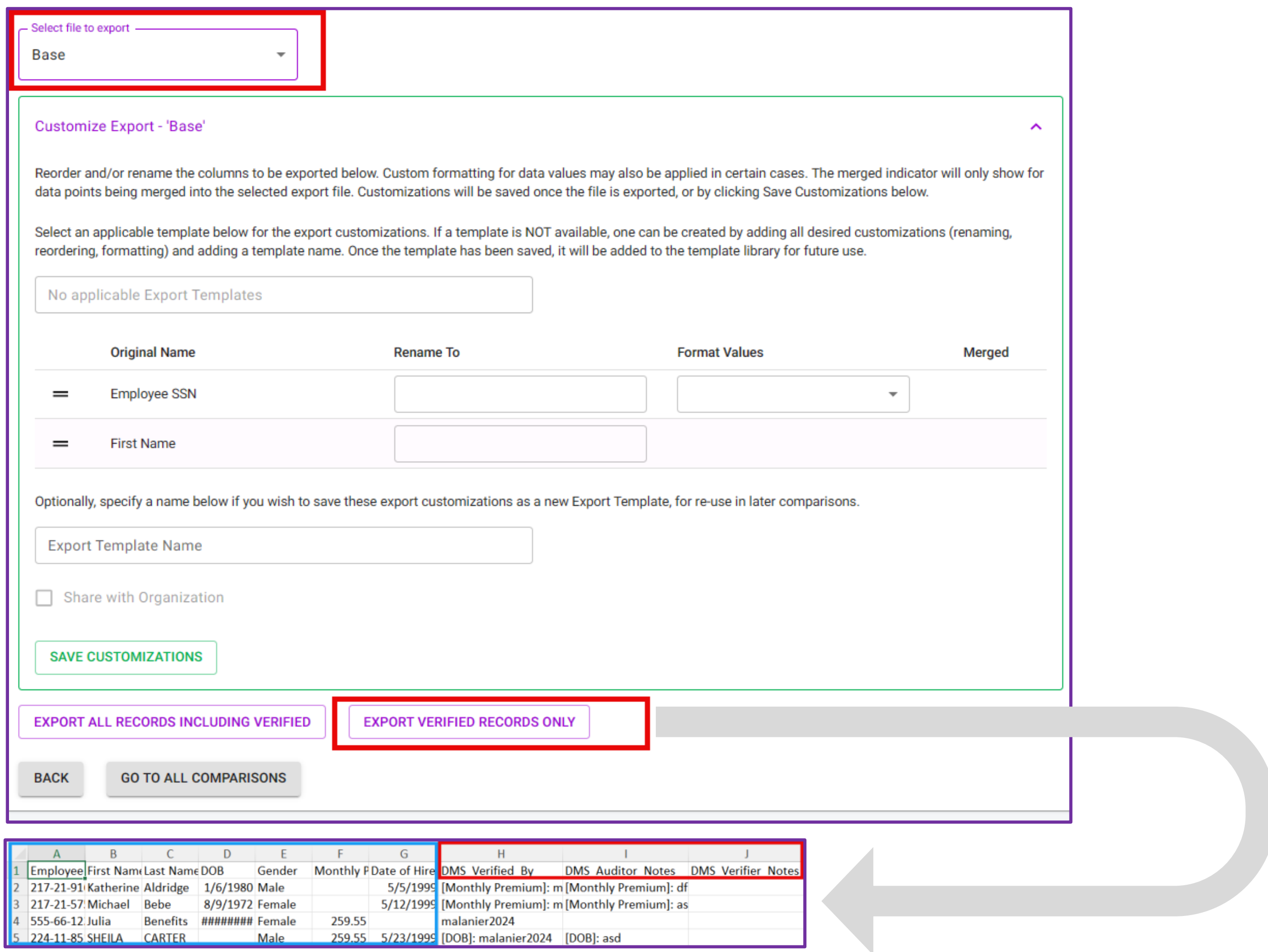


	D	E	F	G	H	I	J	K
1	DOB	Gender	Monthly Premium	Date of Hire	DMS_Verified_By	DMS_Auditor_Notes	DMS_Verifier_Notes	DMS_Ignored_Discrepancies
2	2/18/1989	Male	259.55	5/1/2024				
3	1/3/1975	Female	259.55	5/4/1999				
4	1/6/1980	Male		5/5/1999	[Monthly Premium]: malanier2024	[Monthly Premium]: dfasdfas		

Verified Records only

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

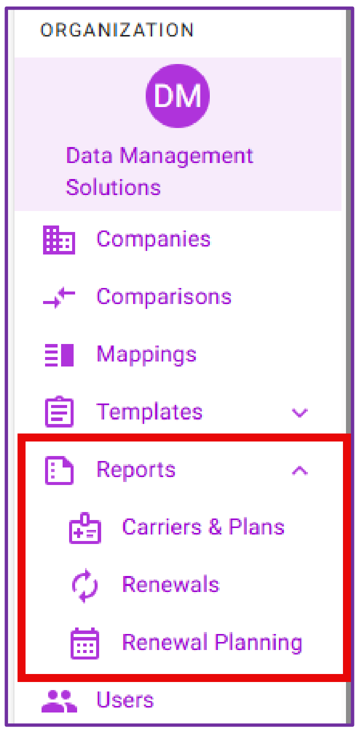
- DMS_Verified_By
- DMS_Auditor_Notes
- DMS_Verifier_Notes
- DMS_Discrepancy_Type



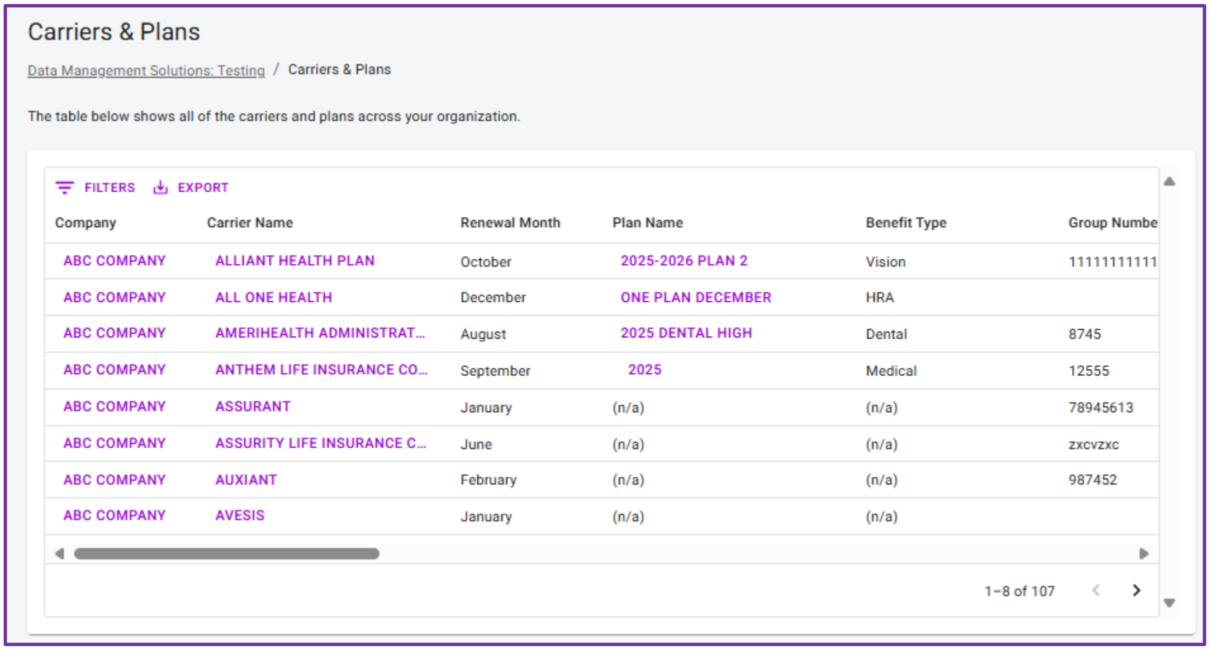
Ignored Records will **not** show in the *Verified Records only* report.

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.



Carriers & Plans

Data Management Solutions: Testing / Carriers & Plans

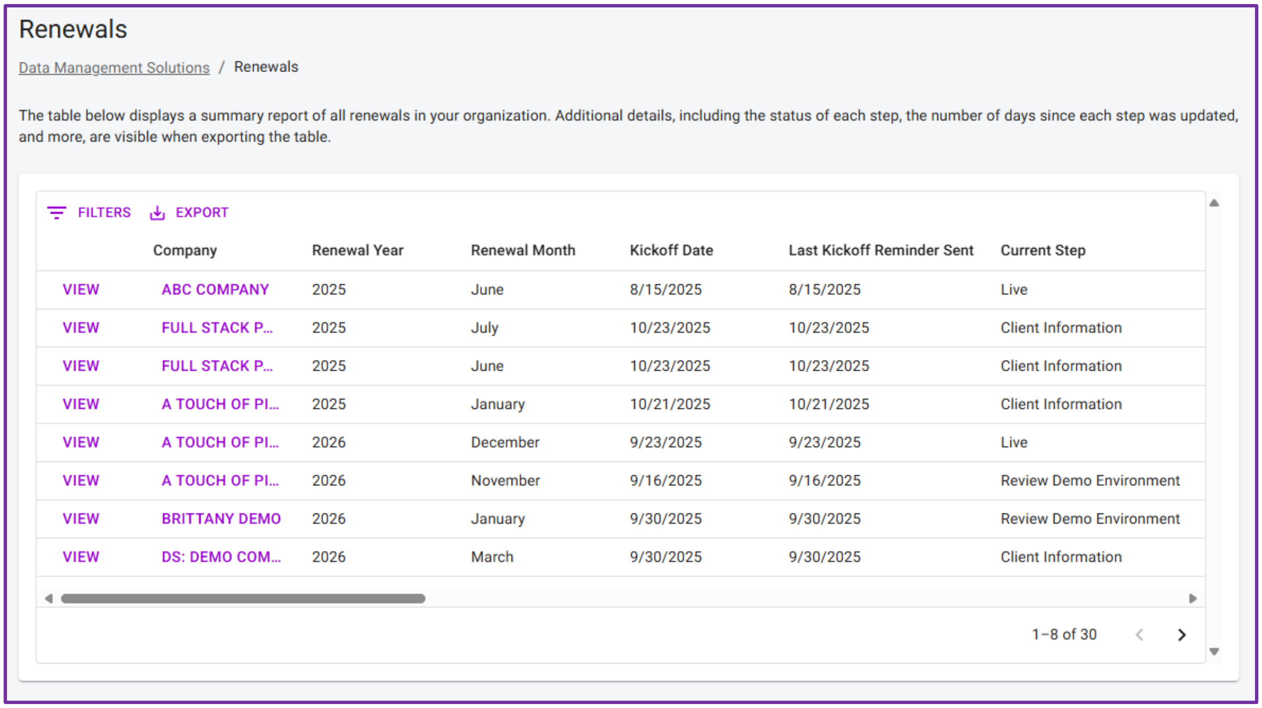
The table below shows all of the carriers and plans across your organization.

FILTERS EXPORT

Company	Carrier Name	Renewal Month	Plan Name	Benefit Type	Group Numbe
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)	

1–8 of 107

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.



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

1–8 of 30

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	✓								

1–8 of 13

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)]

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)]

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)]

Data Management Solutions
Validate ▪ Create ▪ Convert

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

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