Release Update – *October 21*

Broker Builder Solutions/Data Management Solutions is pleased to announce this week's enhancements and fixes to our application. Each enhancement/fix is separated by Applicable Users (subscribers who are directly affected by the enhancement or the fix) for easier viewing.

New + Improved

Applicable users: *Agency and Organization Users*

New Access Level: Agency

We've expanded the available access levels to include a new level called Agency.

The Agency level enables a General Agent to be associated with multiple organizations, providing centralized management across clients. Previously, each organization was limited to its own access level, restricting cross-organization visibility and control.

With this enhancement, a single Agency user can now:

- Manage users, comparisons, and renewals for multiple organizations.
- Access full Organization Admin functionality.
- Initiate group renewals.
- Be designated as the GA Renewal Contact and assigned to other GA-specific fields.

This new level streamlines administration for General Agents and supports more efficient collaboration across organizations.

New Feature: Commenting Without Submitting Client Information

We've enhanced the Client Information step in the Renewal Wizard to improve communication and visibility.

The Comment section has been moved to the top of the page for easier access—especially helpful when Broker Managed is selected.

In addition, users can now save a comment and trigger an email notification without submitting the entire step. This allows for more flexible communication between all parties when information is still under review or awaiting confirmation.

This update promotes greater collaboration and reduces delays in the renewal process.

New Report: Renewal Planning Report

We've expanded the Reports section to include a new Renewal Planning Report, available at both the Organization and Agency levels.

This report provides a clear overview of the renewal months assigned to each company, allowing users to view upcoming renewals at a glance.

Please note, this report is distinct from the Renewal Report, which displays current renewals that have been kicked off but not yet closed.

As a reminder, the Renewal Month is defined at the Carrier level, and all plans under that carrier are automatically included in that designated renewal month.

New Fields: GA Eligibility and GA Audit Contact

We've expanded both the Carrier and Plan Detail pages to include two new fields: GA Eligibility Contact and GA Audit Contact.

If the contacts are populated at the Carrier level, they will automatically flow down to the Plan Detail level for convenience. However, users can overwrite these fields at the Plan level as needed—without impacting the Carrier record or other plans under that same carrier.

This enhancement provides greater flexibility in managing General Agent contact assignments across carriers and plans.

New Benefit Types Added

We've expanded the list of available Benefit Types when adding a plan to provide broader coverage options and improved classification.

New Benefit Types include:

1. Telemedicine
2. Specified Disease
3. **Prescription** – This benefit type is an alias of **Pharmacy / RX** and can be imported. However, it will only appear as **Pharmacy / RX** in the Benefit Type dropdown.
4. Financial Perks
5. Long Term Care

These additions enhance plan setup flexibility and ensure more accurate benefit categorization across carriers and organizations.

New Carriers Added

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

Allegiance Benefit Plan Management	Health Promotion Northwest

Business Health Services (BHS)	Infinisource
Circle Health	John Hancock
ComPsych	SIHO
Edward Jones	T Rowe Price
Empower Retirement	The Harrison Group
Health Plans, Inc	Unspecified Carrier

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

Updated Section: Rates, Rounding, Plan Limits, and Contributions

We've enhanced the Plans Checklist step in the Renewal Wizard to provide greater clarity during plan reviews.

The section previously titled "Rates, Rounding or Plan Limits Changing" has been updated to include Contributions in the naming convention. This change emphasizes that contribution details per carrier plan are an essential component requiring confirmation during the renewal review process.

This enhancement ensures a more complete and transparent review of all key plan factors impacting renewal accuracy.

Enhanced Visibility: Renewal Kickoff Tracking

We've added new tracking details to the Renewal Kickoff feature on Step 1: Client Information within the Renewal Wizard.

Once a Renewal Kickoff email has been submitted, users will now see:

- The date of the last Kickoff email sent, and
- A counter displaying the total number of Kickoff emails sent for that renewal.

This enhancement improves transparency and allows users to easily monitor Renewal Kickoff activity at a glance.

Expanded Renewal Report: Additional Fields for Greater Visibility

We've expanded the Renewal Report to include several new fields and updated the naming conventions on a few existing ones to provide deeper insight into renewal timing and activity tracking.

Some fields have also been moved to appear only in the Export file, allowing for enhanced reporting and analysis while maintaining a streamlined on-screen view.

New and updated fields include:

1. Kickoff Date – The date the renewal was triggered in the application.
2. Go Live Date – The date the *Go Live* button was clicked on *Step 6: Review Demo Environment.*
3. Number of Days to Go Live – Total number of days from Kickoff to Go Live.
4. Completed Date – The date the Close Out email was triggered, fully closing the renewal.
5. Number of Days to Completion – Total number of days from Kickoff to Close Out.
6. Last Updated By – Identifies the user who last updated the renewal.
7. Days Since Last Client Information Update – Tracks the total number of days since the Client Information step (GA or Organization) was last updated.
8. Days Since Last Plans Checklist Update – Tracks the total number of days since the Plans Checklist step (GA or Organization) was last updated.
9. Days Since Last Demo Environment Update – Tracks the total number of days since the Demo Environment step was last updated.
10. **Step → Current Step** – Updated field name for improved clarity.
11. **Last Updated → Updated At** – Updated field name for consistency with other application terminology.

These additional data points and naming improvements provide greater visibility into renewal progress and help teams measure efficiency and turnaround time across key milestones.

Enhanced Filtering Functionality

We've improved the filter functionality across the application to make data filtering faster and more user-friendly.

Key updates include:

- **Renewal Report Enhancements**: Several columns—such as *Renewal Month* and *Status*—now feature drop-down filters displaying available values instead of requiring manual text entry. This allows for quicker, more accurate filtering.
- **Improved Layout**: The filter box has been moved above the table to make filtered results easier to view.

These updates streamline the filtering experience and improve overall usability throughout the application.

Enhanced Renewal Wizard File Upload Functionality

We've expanded the file upload capabilities within the Renewal Wizard to support a broader range of formats and easier document sharing.

Key enhancements include:

- New Upload Options: Users can now upload documents directly within the Demo Environment and Live steps of the Renewal Wizard.
- Expanded File Types: In addition to existing supported formats (such as text and Excel files), users can now upload image file types including .jpeg, .tif, .gif, and .bmp.

These updates provide greater flexibility and convenience when attaching supporting documentation throughout the renewal process.

Enhanced Carrier Plans: Extended Plan Name Character Limit

We've increased the character limit for the Plan Name field under Carrier Plans to 200 characters.

This enhancement accommodates plans with longer or more detailed naming conventions, ensuring greater flexibility and accuracy when entering plan information.

Fixes

Applicable users: *Agency and Organization Users*

Resolved Issue: 401k Benefit Type Import Error

We've corrected an issue that caused 401k Retirement and Roth 401k benefit types to generate errors during file imports.

This issue has been resolved, and these benefit types are now fully supported and available for import.

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

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

If you're interested in upgrading your current subscription, please contact our Business Development Team at sales@brokerbuildersolutions.com or complete the online form here:

DVP Platinum Elite Subscription Form - DMS Data Validate