



Data Management Solutions

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DATA VALIDATION PLATFORM

Company Verifier



Updated: 08-30-2022



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Login

The Data Management Solutions – Data Validation Platform can be accessed from the Broker Builder Solutions website at <https://brokerbuildersolutions.com> using BBS supplied username or registered email address. A temporary password is provided in the registration email.

The image shows a screenshot of the Broker Builder Solutions website. The top navigation bar includes links for Home, About, Partner Services, Forms, Data Management Solutions, Contact Us, Careers, and Request For Quote. A dropdown menu is open under 'Data Management Solutions', listing options: Data Validation Platform, Subscription Form, Webinar Registration Form, Login (highlighted with a red box), DV Platform User Guide, and Release Notes. An arrow points from the 'Login' option to a separate window showing the login page. The login page has the following elements:

- Header: Data Management Solutions, Validate • Create • Convert, Powered by Broker Builder Solutions
- Section: Sign in to your account
- Form: Username or email address * (input field: Enter your username or email address)
- Form: Password * (input field: Enter your Password)
- Text: Forgot your password? [Reset password](#)
- Button: SIGN IN
- Footer: CONTACT US



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Select Comparison to verify

Select the comparison to verify.

Welcome, dprince!

Information

EDIT

Company Name Perky Penguin Retail Outlet	Organization Name Broker Builder Solutions Testing
Comparisons Count 11	Users Count 1
Active Yes	

Comparisons

NEW

- Missing numbers
View Reports
- File rename
View Reports
- Pizza Planet compare for Mallory
View Reports
- Compare names and Missing Counts
View Reports
- Enrollment compare_use baseline as second_06162021
View Reports
- Enrollment Compare_06152021
View Reports
- Enrollment compare_06162021**
Verify Discrepancies



Verify Discrepancies

The **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. Once ALL have been verified click SAVE and then NEXT. Auditor comments can be added to POST YOUR NOTES in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

First name	Last name	Relationship	'Carrier' row / data point	'EN' row / data point	Verified Value (Baseline value appears first)	Last Verified By	Post Your Notes
ADRIANA	CHRISTENSEN		68 / Hire Date	8 / Hire Date	Ignore ▾		
GIANNA	CHRISTENSEN		69 / Hire Date	9 / Hire Date	<input type="radio"/> <input checked="" type="radio"/> 1/13/2014 <input type="radio"/> Overwrite <input type="radio"/> Ignore	maryl (1/31/2022)	<div>Auditor notes Missing Hire date</div> <div>Verifier notes</div>

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

Verified Value (Baseline value appears first)	Last Verified By	Post Your Notes
<input type="radio"/> 01/13/2014 <input type="radio"/> 1/13/2014 <input type="radio"/> Overwrite <input checked="" type="radio"/> Ignore ^	maryl (1/31/2022)	<div>Auditor notes fasdf</div> <div>Verifier notes</div>



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Verify Missing

The **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 to select all entries. This will write the information to the file. Once the Verify Missing Data has been verified, click SAVE and then NEXT. Auditor comments can be added to POST YOUR NOTES in the Auditor Notes field. Verifier Notes are also available. However, Auditor Notes are locked to Verifier Users and cannot be changed.

First name	Last name	Relationship	Unique Identifier	'From Ben Admin System' row	'One row per member' row	Duplicate unique identifier	Verified Inclusion	Last Verified By	Post Your Notes
Billy	Marai	Child	111421214	13		11	<input type="checkbox"/> Include? <input type="button" value="INCLUDE ALL"/>		<div>Auditor notes Verifier notes</div>

Complete the Compare

Data verification is complete. 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 still continue to show in the All records including verified download.

Complete

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

Comparison Details

Select file to export

BACK GO TO ALL COMPARISONS

Select file to export

- Select --
- From Ben Admin System
- One row per member



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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 Platforms key words. For a list of the keywords, please reference page 34 Keys Words.

Select file to export
From Ben Admin System

Customize Export - 'From Ben Admin System'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Original Name	Rename To	Format Values
Employee SSN	<input type="text"/>	<input type="text"/>
Social Security Number	<input type="text"/>	<input type="text"/>
Relationship	<input type="text"/>	
First Name	<input type="text"/>	
Last Name	<input type="text"/>	
Gender	<input type="text"/>	
DOB	<input type="text"/>	
Marital Status	<input type="text"/>	
Class	<input type="text"/>	
Employee ID	<input type="text"/>	<input type="text"/>
Employment Status	<input type="text"/>	
Hire Date	<input type="text"/>	
Termination Date	<input type="text"/>	

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED EXPORT VERIFIED RECORDS ONLY

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



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Select file to export
From Ben Admin System

Customize Export - 'From Ben Admin System'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Original Name	Rename To	Format Values
Employee SSN	<input type="text"/>	<input type="text"/>
Relationship	<input type="text"/>	<input type="text"/>
Social Security Number	<input type="text"/>	<input type="text"/>
Last Name	<input type="text"/>	<input type="text"/>

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

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

Questions: Contact Datatool@BrokerBuilderSolutions.com



Reports

The Data Validation Platform provides several downloadable reports

1. Discrepancy Report
2. All Records Including Verified
3. 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.

View Reports

This comparison is done! [DOWNLOAD DISCREPANCY REPORTS](#)

[DOWNLOAD ORIGINAL BASELINE FILE](#) [DOWNLOAD ORIGINAL SECONDARY FILE](#)

Comparison Details

Discrepancy Counts by Data Point			Missing Counts	
'Enrollment census'	'From Ben Admin System'	Count	Missing from 'Enrollment census'	Missing from 'From Ben Admin System'
Relationship	Relationship	3	1	0
Gender	Gender	2		
Date of Birth	DOB	3		

21 | [Discrepancies](#) | [Missing Data](#) | +

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



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(discrepancies and missing). The *All Records Including Verified* report also includes 4 additional columns added to the original files:

- BBS_Verified_By
- BBS_Auditor_Notes
- BBS_Verifier_Notes
- BBS_Ignored_Discrepancies

Select file to export
From Ben Admin System

Customize Export - 'From Ben Admin System'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Original Name	Rename To	Format Values	Merged
Employee SSN	<input type="text"/>	<input type="text"/>	
Relationship	<input type="text"/>		

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED

T	U	V	W	X	Y
Plan Monthly Cost	Enrolled On	BBS_Verified_By	BBS_Auditor_Notes	BBS_Verifier_Notes	BBS_Ignored_Discrepancies
717.91	2018-06-12T04:00:00.000Z				
45.32	2018-06-12T04:00:00.000Z				
8.62	2018-06-12T04:00:00.000Z				
1623.48	2020-06-10T04:00:00.000Z				
78.17	2020-06-10T04:00:00.000Z				

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 3 additional columns added to the original files:



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- BBS_Verified_By
- BBS_Auditor_Notes
- BBS_Verifier_Notes

Select file to export
From Ben Admin System

Customize Export - 'From Ben Admin System'

Reorder and/or rename the columns to be exported below. Custom formatting for data values may also be applied in certain cases. The merged indicator will only show for data points being merged into the selected export file. Customizations will be saved once the file is exported, or by clicking Save Customizations below.

Original Name	Rename To	Format Values	Merged
Employee SSN	<input type="text"/>	<input type="text"/>	
Relationship	<input type="text"/>		

SAVE CUSTOMIZATIONS

EXPORT ALL RECORDS INCLUDING VERIFIED EXPORT VERIFIED RECORDS ONLY

T	U	V	W	X
Monthly Cost	Enrolled On	BBS_Verified_By	BBS_Auditor_Notes	BBS_Verifier_Notes
717.91	2018-06-12T04:00:00.000Z			
45.32	2018-06-12T04:00:00.000Z			
8.62	2018-06-12T04:00:00.000Z			
	2020-06-10T04:00:00.000Z			
	2020-06-10T04:00:00.000Z			
	2020-06-10T04:00:00.000Z			

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



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Key Words

The Platform 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

First Name:

- first name
- firstname
- first_name
- fname

Last Name:

- last name
- lastname
- last_name
- lname

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



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Knowledge Base



The Data Validation Platform provides a knowledge base for frequently asked questions.

[DV Platform Knowledge Base | Broker Builder Solutions](#)

Benefit Systems



The Data Validation Platform provides instructional videos for various carrier files for enrollments and invoices.

[DV Platform Benefit Systems | Broker Builder Solutions](#)

Release Notes



The Data Validation Platform release notes are available through our website for reference.

[Release Notes Log | Broker Builder Solutions](#)