



# Data Management Solutions

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## DATA VALIDATION PLATFORM

### Organization Verifier





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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 screenshot displays 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 such as 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 form. The form is titled 'Sign in to your account' and contains fields for 'Username or email address' and 'Password', both with placeholder text. A 'SIGN IN' button is located at the bottom right of the form. A 'CONTACT US' link is visible at the bottom of the page.



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## Select Company

Select the company for the comparison verification.

Broker Builder Solutions

Welcome, dprince!

Information

Organization Name	Users Count
Broker Builder Solutions Testing	8
Total Companies Count	Active Companies Count
5	5
Inactive Companies Count	
0	

Companies

- BP BBS Post OE Audit
- PP Perky Penguin Retail Outlet

## Select Comparison to verify

Select the comparison to verify.

Welcome, dprince!

Information

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

Comparisons

- Missing members  
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



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## 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"/> 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 row	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</div> <div>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](mailto:Datatool@BrokerBuilderSolutions.com)





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## 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.

The screenshot shows the 'Compare' step in the Data Management Solutions interface. The progress bar at the top indicates the following steps: Create, Import Data, Select Data Points, Map Data, Compare (current step), Verify Discrepancies, Verify Missing Data, and Complete. Below the progress bar, the text 'View Reports' is displayed. A message states 'This comparison is done!' followed by a 'DOWNLOAD DISCREPANCY REPORTS' button. Below this are two buttons: 'DOWNLOAD ORIGINAL BASELINE FILE' and 'DOWNLOAD ORIGINAL SECONDARY FILE'. A 'Comparison Details' section is expanded, showing two tables: 'Discrepancy Counts by Data Point' and 'Missing Counts'. The 'Discrepancy Counts by Data Point' table has the following data:

'Enrollment census'	'From Ben Admin System'	Count
Relationship	Relationship	3
Gender	Gender	2
Date of Birth	DOB	3

The 'Missing Counts' table has the following data:

Missing from 'Enrollment census'	Missing from 'From Ben Admin System'
1	0

Below the tables, a navigation bar shows '21' records, with 'Discrepancies' and 'Missing Data' tabs. A large grey arrow points from the 'DOWNLOAD DISCREPANCY REPORTS' button to the 'Discrepancies' tab.

### 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

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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

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

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

## Benefit Systems

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

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

## Release Notes

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

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