EnrollHere

Sprint Updates

New platform enhancements that simplify operations, improve productivity and strengthen reliability.

September 14-18, 2026 | 37 New & Improved Features

FEATURED ENHANCEMENTS

3 Categories

At a Glance

- Smarter AI dialing, queue controls and agent tools
- Clearer reporting, appointment exports and call-cap visibility
- Stronger compliance scorecards and complaint workflows
- More flexible commission, hierarchy and payout management
- More reliable Intelligence Chat and operational recommendations

Questions about these updates?
Contact your EnrollHere customer success manager or email support@enrollhere.com.

Agency Experience: AI Dialing, Queue Management and Interface Improvements

- **Task-Driven AI Dialing**
  AI dialing campaigns can use agents selected through task categories, providing agencies with greater control over automated campaign workflows.
- **Messaging Number Validation**
  Toll-free numbers are prevented from being added to incompatible 10DLC messaging campaigns, reducing configuration errors.
- **Improved Screener-Transfer Matching**
  Valid screener transfers are recognized more consistently, improving transfer tracking and reporting.
- **Employee Number-List Access**
  Employees can view and edit number lists based on their assigned roles.
- **Exports That Reflect Visible Columns**
  Queue exports include only the fields displayed by the user, reducing cleanup and limiting the export of unnecessary information.
- **Healthcare Directory Search**
  Provider, pharmacy and prescription directories now include autocomplete while preserving manual entry and user privacy.
- **Clearer Missing-Email Display**
  Lead records without an email address display a clear, consistent empty state.
- **Improved Appointment Exports**
  Scheduled appointment exports include the actual appointment date and time, helping teams forecast callbacks without relying on the original booking timestamp.
- **Pause Reporting by Category**
  Agent reports show pause durations by category, helping managers distinguish breaks, lunch, training and other unavailable time.
- **Balanced Caller ID Rotation**
  Outbound calls rotate more evenly among available caller IDs, helping prevent individual numbers from being overused.
- **Call-Cap Status Visibility**
  Managers can distinguish between tag-level and agency-level call caps and better understand why an agent has stopped receiving calls.
- **Updated Call-Cap Dashboard**
  Authorized employees receive access to the current tag-aware call-cap dashboard, providing a more complete view of queue activity.
- **One-Click Saved-Number Calling**
  Agents can place a call directly from a saved dial-pad contact, eliminating an additional dialing step.
- **Readable Funding Balances**
  The selected account's available balance is clearly displayed in both light and dark modes.
- **AI Voice Preview**
  Users can listen to an AI agent's voice before saving or publishing it, making voice selection easier and more informed.
- **Tag-Aware Precall Checks**
  When a vendor check fails, only the affected agent groups are excluded. Duplicate checks across queues are also prevented.

See Page 2 for additional featured enhancements. ↓

Agency Experience: Compliance and Scorecards

- **Stable Scorecard Metrics**
  Scorecard metrics remain available when names are edited, preserving reporting continuity.
- **Cleaner Scorecard Organization**
  Scorecards now use a cleaner hierarchy that removes redundant labels and prevents technical identifiers from appearing while content loads.
- **Unified Compliance Workspace**
  Compliance dashboards, definitions and agent scores are organized in one dedicated workspace, making compliance information easier to access.
- **At-Risk Agent Visibility**
  Teams can quickly identify and filter agents whose scores fall below established compliance thresholds.
- **Live Scorecard Readiness Totals**
  Category changes immediately update importance totals, keeping scorecard readiness guidance accurate.
- **Visual Scorecard Launch Builder**
  Teams can configure scorecard conditions through a guided When/If/Then canvas, simplifying the setup of launch criteria.
- **Consistent Scorecard Rule Matching**
  Saved scorecard rules use a consistent format, improving matching reliability while maintaining compatibility with existing configurations.
- **Reliable Scorecard Analysis**
  Scorecard analyses process more consistently across compliance workflows.

Complaint Management

- **External Carrier-Submission Confirmation**
  Authorized external users can confirm that a complaint was submitted to the carrier and attach supporting evidence. The confirmation is recorded in the audit history, reporting and notifications without closing the complaint.
- **Agency-Controlled SLA Timing**
  Complaint timeliness is measured until the complaint reaches the carrier. Carrier response time is no longer included in the agency's performance measurement.

Commissions: Payout Rules, Hierarchies and Cycle Management

- **Recoverable Payouts**
  Partially paid cycles remain open when a payee has not connected an account. The remaining payout can be completed after the account is connected.
- **Carrier-Renewal Recognition**
  Qualifying carrier renewals are recognized and processed consistently within commission workflows.
- **Readable Payee Names**
  Reports and exports display authorized payee names for clearer payout review and reconciliation.
- **Editable Commission Cycles**
  Users can update commission-cycle names and end dates. Changes are reflected across related commissions, payouts, reports and search results.
- **Protected Source-Agent Deletion**
  Source-agent records connected to transfer or legacy payment data are protected to preserve commission history.

Data and Intelligence

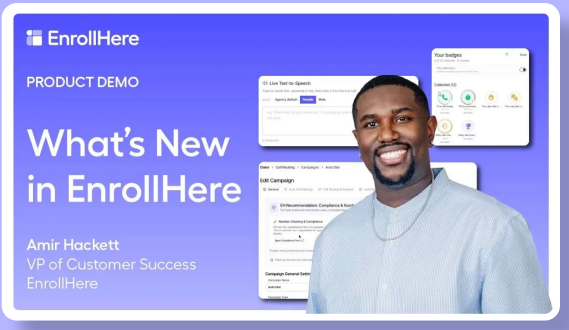
- **Improved Intelligence Chat Reliability**
  Intelligence Chat provides a more consistent experience across page reloads and browser tabs.
- **Suggested Starter Prompts**
  Suggested prompts in the Dialer help users begin Intelligence Chat conversations more quickly.
- **Expanded Complaint Analytics**
  Complaint creation, update and deletion activity flows into the analytics layer, supporting more complete complaint reporting.
- **Durable Chat Completion**
  Intelligence Chat confirms a successful response only after the final answer has been saved, reducing the risk of lost or inconsistent responses.
- **More Current Recommendation Data**
  Operational recommendations use more current queue configurations, reducing the likelihood of guidance based on recently changed settings.
- **Recommendation Safeguards**
  New validation, scheduling and access controls help prevent recommendations from activating until all required settings are complete.

Feature availability may vary based on your agency's platform configuration and permissions.

EnrollHere Product Demos

New Dialer Features Built for AEP Readiness

What if your dialer could take more work off your agents' plates and give managers visibility before problems become surprises? In this product update, Amir Hackett, VP of Customer Success at EnrollHere, walks through the latest features we've shipped to the EnrollHere dialer, all designed to make day-to-day operations more automated, visible, and manageable.



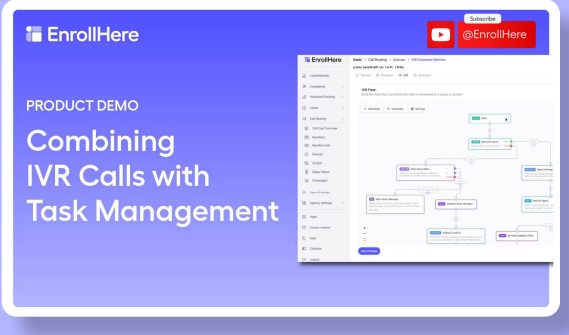
Understanding Lifetime Value for Your Book of Business

What is your book of business really worth and how much future revenue can it generate? In this EnrollHere product demo, Sawyer Nyquist, Head of Data at EnrollHere, walks through how EnrollHere's Lifetime Value (LTV) calculations help insurance agencies understand the current and future value of their policies.



Turn Customer Calls Into Actionable Follow-Ups

Every customer interaction deserves a timely response, even when agents are unavailable. EnrollHere now connects interactive voice response calls directly to task management, automatically creating and assigning follow-up tasks based on each caller's needs.



Intelligence Chat: Your On-Demand Data Analyst

See how Intelligence Chat answers real-time questions and uncovers insights across call center performance, compliance and policies. Sawyer Nyquist demonstrates how teams can investigate complex business questions using their data.

