

Verato®

MDM Cloud™

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General Questions

What does Verato's upgraded platform mean, and will I need to upgrade my account?

Verato's latest product release is a faster, smarter, and more intuitive version of the Verato platform. Built on the same trusted foundation, it includes powerful new capabilities and a modernized user experience to support expanded use cases across healthcare and beyond. As a result, we've updated the name of our software platform to Verato MDM Cloud™.

While your APIs, data storage, and matching logic remain the same, we've rebuilt key technical components, including the user interface and stewardship task framework, to support new features and speed up innovation. To access these updates, a simple upgrade is required; however, there's no requirement to reload data or modify integrations.

Why is Verato upgrading the platform?

This is the most significant update to the Verato platform since its inception. It introduces new features, adds more data governance options, and enhances usability, helping you get more value from your data with less effort.

What's changing in the platform?

Key enhancements include:

- **Verato Smart Steward™:** An AI-powered stewardship tool that recommends how to resolve tasks for more complete and accurate identity views, improving match quality and reducing manual effort.
- **Granular Permissions and Access Control:** A redesigned framework for managing users, user groups, sources, permissions, and platform settings with greater control and ease.
- **Data Governance and Stewardship:** Enhanced workflows and tools to help teams identify, review, and resolve data discrepancies more efficiently.
- **Data Authoring:** The ability to add, correct, and manage data attributes directly through the UI to ensure accuracy and completeness.
- **Data Synchronization:** A modern publish/subscribe architecture that keeps your systems updated with the most current and trusted identity data.

Advanced enhancements available for unlocking:

- **Entity 360:** A robust new data model and configurable user experience that provides holistic views of each identity using your data combined with Verato enrichment. It supports a wide range of attributes and roles using pre-built models with no coding needed.
- **Cohort Analyzer:** A dynamic reporting and insights layer that lets analysts and stewards create, analyze, and extract population cohorts using mastered and enriched data. This enables more intelligent segmentation, deeper analytics, and more effective outreach.

How will this benefit my organization?

The updated version of the platform enables new use cases, including:

- **Data Governance:** Enhanced automation, comprehensive governance controls, and streamlined stewardship workflows enable data integrity teams to more effectively govern, author, edit, and resolve data issues, while synchronizing mastered records across the enterprise.

- **Verato Population Intelligence & Provider Network Intelligence:** Pre-built analytic models, deeply integrated with Verato enrichment data, support advanced use cases.
 - Population Intelligence helps identify and understand target audiences for marketing campaigns.
 - Provider Network Intelligence delivers insights into provider affiliations and service volumes across U.S. markets, enabling more accurate network analytics.

Advanced benefits available for unlocking:

- **Entity 360:** Provide complete and trusted 360-degree views of your customers with industry-leading accuracy, native data enrichment, and advanced insights. These unified views empower exceptional experiences at every stage of the customer journey.
- **Consent and Preferences Management:** The Verato data model now supports storing, managing, and synchronizing complex consent and preference attributes for individuals, ensuring compliance and personalization across systems.

Will I need to update my data or integrations?

No. Your APIs, data, and existing integrations (including Connect HL7 and batch) will continue to function as they currently do. The upgrade does not require any changes to your data or system connections.

Upgrade Process

What is the upgrade timeline?

November 7, 2025: Non-production upgrades begin.

December 5, 2025: Production upgrades begin.

Is there flexibility in the timing of the upgrade?

This upgrade minimizes the impact on our customers to ensure a smooth transition. Since this upgrade occurs in the background, we will create a schedule that balances both the needs of our customers and the desire to get the new tool set and features into your hands as quickly as possible. If you have specific timing concerns, please inform your Customer Success Manager, and we will take them into account as we finalize the upgrade schedule.

Will there be any downtime?

Upgrades will happen during scheduled maintenance windows. While minor service issues may occur, any downtime will be communicated in advance.

Will Verato provide test plans?

Yes. We'll share validation templates to help you confirm data integrity and functionality. These are optional and available for your use.

What effort is required from my team?

Minimal. Here's what you'll need to do:

- Confirm user roles and permissions via a support ticket created on your behalf by Verato.

- Help users familiarize themselves with the new UI and adapt to any workflow changes. Users should watch the training video, participate in informational sessions, and attend office hours to learn how to navigate the new UI.
- Ensure stakeholders are informed of any process changes.
- Optionally validate workflows using provided templates.
- If you have API integrations or automated workflows, you may wish to verify that they are functioning as expected post-upgrade.

What if something goes wrong during the upgrade?

We'll start with lower environments (e.g. dev and test) to ensure everything runs smoothly before upgrading production. A rollback process is available if needed.

Technical Details

Will my data be transferred?

Your identity data (the 'source' records you send to Verato) does not need to be transferred as part of the upgrade. The only data that will be transferred is stewardship task data. Verato will handle this for you—no action is needed on your part.

Will my existing integrations work?

Yes. Your existing current API and data integrations will continue to function without changes.

Will URLs or IP addresses change?

- The URL for logging into the Verato UI will change. When it's your turn for upgrade, Verato will provide you the new URL and credentials, if required.
- API URLs will stay the same.
- If you've allowed listed Verato IPs, we'll provide updated addresses as needed. Any of your IP addresses that Verato has added to our 'allow list' will continue to be used in our 'allow list' in the upgraded platform.

We use Auto-Steward—does this affect us?

No. Your Auto-Steward setup will stay the same. Future enhancements may add UI and dashboard features, but your current integration will remain unaffected.

UI and Reporting

Will the UI change significantly?

Yes. The new UI provides enhanced stewardship workflows, AI-powered recommendations, and more detailed analytics. While familiar in structure, it introduces new orchestration and governance capabilities.

Will I be able to create and export reports?

Yes, some users will be able to perform more advanced analytics and generate reports about data quality and stewardship tasks using a new self-service insights layer of the platform.

Additionally, the advanced insights option, called Cohort Analyzer, allows for report extraction to a preferred file format (such as Excel, .csv, or .txt). This feature also offers the ability to schedule reports to an SFTP or S3 location. Contact your Verato Customer Success Manager for more information.

Will my existing reports be migrated?

Yes. Customized reports, SFTP reports, and emailed reports will be migrated to the new insights layer of the platform.

Are there new out-of-the-box reports?

Yes, this is a key enhancement in the new user experience. The standard Operational Reports available to all UI users include the same dashboards and metrics that you currently have access to, as well as additional metrics, such as Usage Analytics.

Additionally, a more advanced insights option, called Cohort Analyzer, is available for unlocking, providing users with a powerful ability to explore, analyze, and export data. Verato offers pre-built starting points, but you can also extend and modify those to suit your needs.

Does the new UI work on all browsers?

It supports every browser, but we recommend using the latest version of Google Chrome.

Will the new UI provide the ability to understand match scores and the reasoning behind matching decisions?

Surfacing match scores (bonuses and penalties) on tasks will be available in a future release.

I'm not enabled on the UI today. Is the upgrade different for me?

Yes – if you have not previously used Verato's UI, the upgrade process will involve less change, because you won't need to re-learn something you were never using! However, if your Verato implementation was configured to generate data stewardship tasks (even if you weren't reviewing them in the UI), the upgrade process is still necessary to upgrade to the new framework that manages your stewardship tasks.

Training and Support

What kind of training will be provided?

Training will be delivered through:

- A video overview of the new UI and features.
- Office hours with the Product and Customer Experience teams will be available to provide demonstrations and answer any questions.
- Post-production office hours, ad-hoc sessions will be available as needed—contact your Customer Success Manager to schedule.

Will there be a dedicated support team to assist with the transition?

Yes. Verato's Product, Customer Experience, and Support teams will oversee the upgrades for all environments until they are complete. This combined team will be available to troubleshoot break-fix issues and answer technical questions submitted via tickets on the Verato Support Portal.

For non-technical inquiries, please reach out to your Customer Success Manager for assistance and triage.

How can I get help if I encounter issues during the upgrade?

Verato's Product, Customer Experience, and Support teams are available to assist you if you encounter problems. Please submit a ticket through the Verato Support Portal for any technical issues. For general questions, contact your Customer Success Manager.

Pricing and Packaging

Will the pricing change with the updated version of the platform?

No. Your pricing will stay the same unless you decide to add new capabilities outside your current license.

Are there new subscription packages available?

With the release of this upgraded version of the platform, Verato is also introducing new product packages and platform infrastructure tiers to better meet our customers' use cases and needs. Please reach out to your Customer Success Manager if you have any questions about the packages.

Will the upgrade be covered under my Customer Success Plan (CSP)?

Yes. Customers with an active CSP will not incur additional service costs for the upgrade.

Security and Compliance

Is the updated platform still compliant with industry standards?

Yes. Verato continues to be HITRUST, SOC 2, and PCI certified.

How is data security handled on the updated version of the platform?

Our security posture remains unchanged. We're happy to re-send our security documentation if needed.

Will my data privacy be protected during and after the upgrade?

Absolutely. Verato's security posture remains unchanged, and your data will be protected throughout the transition.

Customization and Configuration

Will my current configurations be carried over?

Yes. Your existing configurations, including matching logic, will be maintained.

How can I configure the updated platform to align with my existing workflows?

The new UI allows individual users to personalize certain aspects of the viewing experience. For example, users can set their own search views, task filters, and identity detail view configurations directly within the UI.

There is a much broader set of configuration options that are managed by Verato's implementation and support teams on your behalf. Your Customer Success Manager can also discuss how to align any new configuration options with your use cases.

Feedback and Future Development

How can I submit feedback on the upgraded platform?

You can submit feedback via support tickets or through Verato's Customer Advisory Board (CAB) if you are an active participant.

Will there be regular updates to the platform?

Yes. Verato releases major updates three times a year, with monthly incremental releases and hotfixes as needed.

How is customer feedback incorporated into future releases?

Customer feedback from all input channels (support tickets, CAB, and discussions with Customer Success Managers, for example) are incorporated into Verato's product releases through a prioritization process based on impact and demand. They are also included in Verato's development sprints and product roadmap. Factors influencing prioritization include the severity of the impact and the number of users or customers requesting the same enhancement.