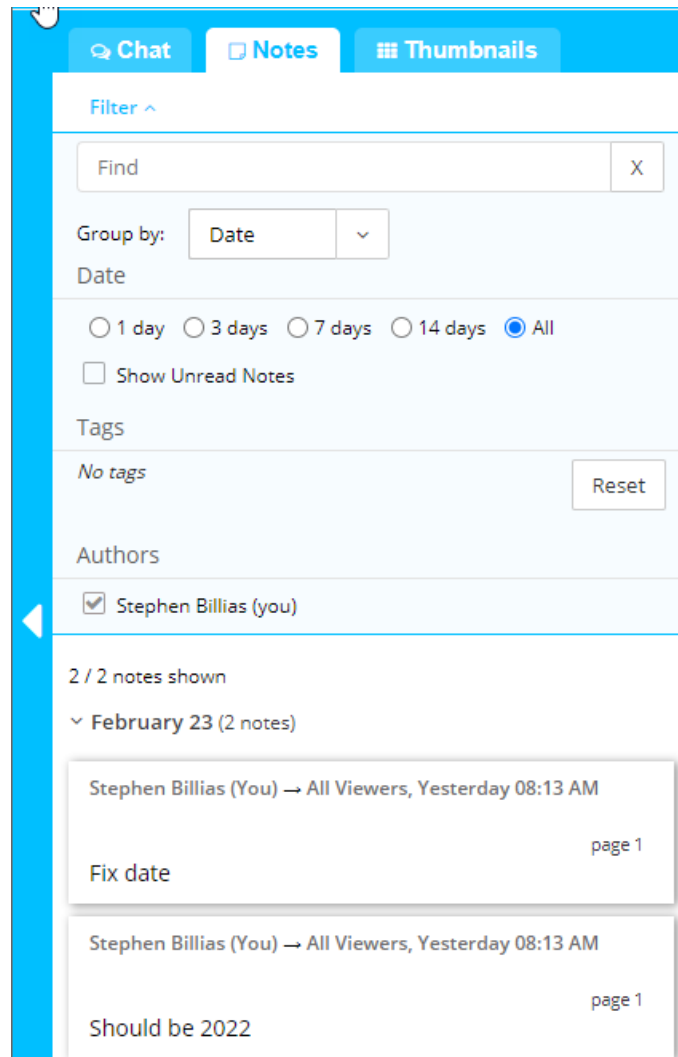# CodySoft March 11th 2021 release notes:

Collateral Management Module:

1. Annotate Review space upgrade:
    a. Additional sizing and fit to page selections.
        i. The vertical double-arrow ↕ positions the entire annotations area vertically as a single page
        ii. The horizontal double-arrow ↔ positions the entire annotations area horizontally as a single page
    b. Additional notes filtering options including 'contains' word search.

PBP Module:

1. Add Select All checkboxes to Manage PBPs

Manage PBPs

Select plans to re-process the latest imported values under the latest rules, or click the grid icon to view the current data for that plan.
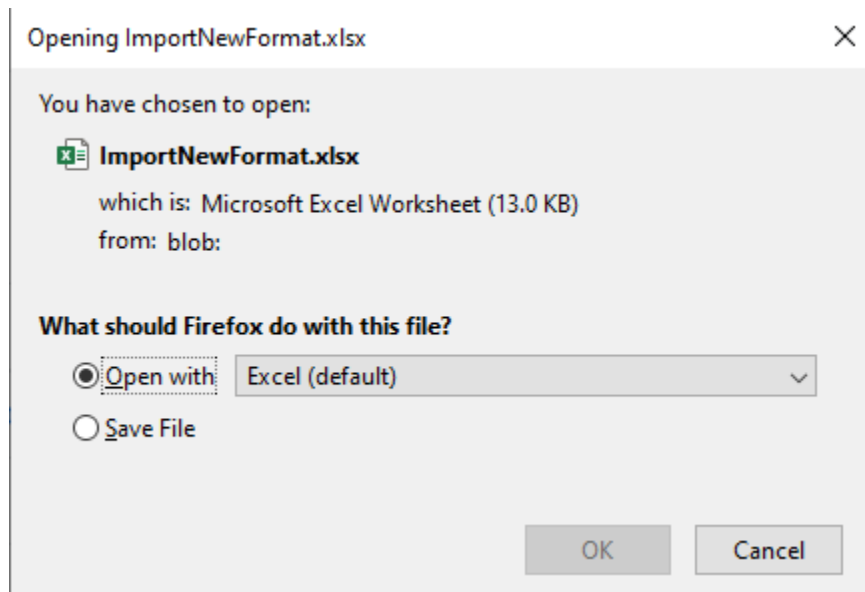
Selected Plans:

[ ] Select all on screen regardless Plan Type

Actions	Contract Number	Plan ID	Segment ID	Current Year	Updated On ↓	Updated By	Created On	Created By
	Filter	Filter	Filter	Filter		Filter		Filter

[ ] All visible Plans of type **MAPD - HMO / MA - HMO**

[ ] ▦ ▮	H3251	002	0	2021	2/23/21	Brian Yavorsky	2/11/21	Brian Yavorsky
[ ] ▦ ▮	H3251	029	0	2021	2/23/21	Brian Yavorsky	2/11/21	Brian Yavorsky
[ ] ▦ ▮	H3822	001	0	2021	2/23/21	Brian Yavorsky	2/11/21	Brian Yavorsky
[ ] ▦ ▮	H3822	002	0	2021	2/23/21	Brian Yavorsky	2/11/21	Brian Yavorsky
[ ] ▦ ▮	H3822	012	0	2021	2/23/21	Brian Yavorsky	2/11/21	Brian Yavorsky
[ ] ▦ ▮	H3979	001	0	2021	2/23/21	Brian Yavorsky	2/11/21	Brian Yavorsky
[ ] ▦ ▮	H8133	001	0	2021	2/23/21	Brian Yavorsky	2/11/21	Brian Yavorsky

Reprocess Selected Plans

2. Retrieve Files Uploaded and show MDB uploaded
   a. Download a PBP schema, PBPDICT .mbd file, or Companion schema

Opening ImportNewFormat.xlsx

You have chosen to open:

📄 **ImportNewFormat.xlsx**

which is: Microsoft Excel Worksheet (13.0 KB)
from: blob:

What should Firefox do with this file?

( ) Open with   Excel (default)
( ) Save File

OK   Cancel

   b. Upload new PBPDICT .MBD file

MDB Schemas

Upload a PBPDICT .mdb file

Title	CMS Plan Types	Created By	Created On	Updated By	Updated On	
PBPDICT2022.mdb	HMO, HMOPOS, LPPO, PSO State License, MSA, RFB PFFS, PFFS, MMP HMO, MMP HMOPOS, 1876 Cost, 1833 Cost, PACE, PDP, RPPO, Fallback, ED PDP, ED PFFS, RFB HMO, RFB HMOPOS, RFB LPPO, RFB PSO State License, ED LPPO	Stephen Billias	3/4/21	Stephen Billias	3/4/21	Remove

3. Field Archive selection
    a. Use the **Clear**, **Select All Within Result**, and **Deselect All Within Result** buttons as needed to help you refine your search. When you have made selections, the Archive Fields button displays: