

CodySoft Collateral Management[®] QuickStart Guide

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CollateralManagement
module®

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Getting Started in CodySoft®'s Collateral Management Module®

Logging in for the first time

CodySoft® sends you a confirmation email when you are first added to the list of registered users at the start of a project.

1. From the confirmation email, click the link to confirm your email address. When you log in for the first time, you are prompted to create a new password.
2. In the New Password field, enter a **new password**
3. In the Confirm New Password field, enter the **new password** again.
4. Click **Submit**. The login screen displays.
5. Enter your **user name** and **password**
6. Click **Login**
7. Click **Launch csCM** to begin working in that module

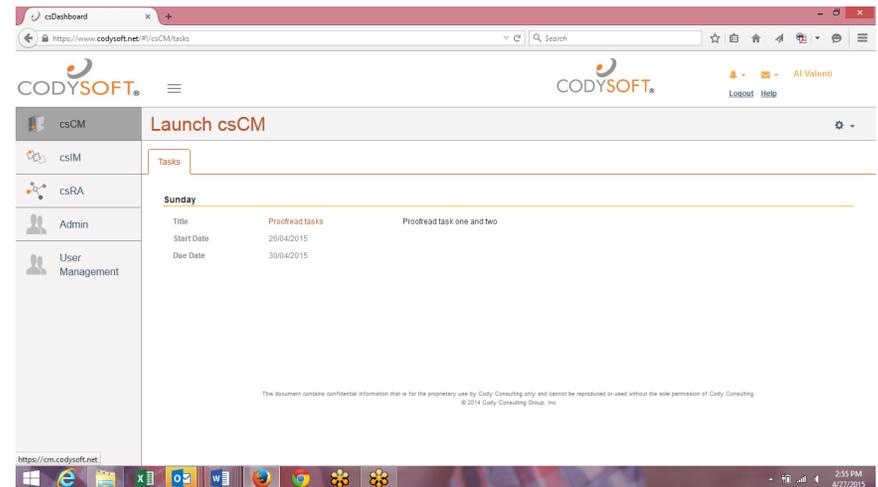
Changing your password (existing users)

1. On the login screen for CodySoft, click **Forgot or need to reset your password?**
2. Enter the email address that you use to access CodySoft

3. Click **Submit**. You will receive an email with a Reset Password link
4. Enter a **new password** that meets the criteria shown on that screen.
5. Click **Submit**. You will be redirected to the login page where you can login with this new password.

Main Dashboard

The main dashboard is the first screen you see after you log in to CodySoft®. It provides you with access to the different modules your company has licensed.





The csCM on the menu bar on the left side of the screen is an acronym for is CodySoft®'s Collateral Management Module®. To launch the Collateral Management Module®:

1. Click **csCM**. The Launch csCM button appears
2. Click **Launch csCM**.

NOTE: To access Collateral Management directly in the future:

1. Bookmark <http://cm.codysoft.net> in your web browser.
2. Select the bookmark to go to the login screen
3. Enter your username and password. The Collateral Management Dashboard displays.

csCM® Dashboard

The dashboard is the first screen you see after you log onto the Collateral Management Module®. It provides you with at-a-glance views and convenient access to your projects, tasks, discussions and compliance submissions. Your view is customizable and is unique to your access role. There are five tabs on the Dashboard:

My Projects—displays your list of current projects. See *Setting up the Project*.

Tasks—displays the list of all tasks assigned to you.

My Discussions—displays the list of all active discussions that you are in.

Submissions—displays the list of all submissions that you have filed.

Approvals—displays the list of all pending approval items in three categories:

- Assets
- Templates
- Versions

Dashboard

The screenshot shows the Dashboard interface with five tabs: My Projects, Tasks, My Discussions, Submissions, and Approvals. The Approvals tab is active, displaying three sections: Asset Approvals, Template Approvals, and Version Approvals.

Asset Approvals
Showing 1 to 4 of 4 entries

Asset Name	Created By	Created On
SBTEST441218	Stephen Billias	4/12/2018
TestCreateAsset41118-1	Stephen Billias	4/11/2018
SBTest41218	Stephen Billias	4/12/2018
Sample CY17 HMO Rules Grid 11-9-16	Stephen Billias	11/8/2016

Show 10 entries

Template Approvals
Showing 1 to 3 of 3 entries

Job Number	Project Title	Created By	Created On
412	Stephentest2	Stephen Billias	4/3/2018
423	adasd	Alphonse Valenti	4/13/2018
423	sdfsdf	Alphonse Valenti	4/13/2018

Show 10 entries

Version Approvals
Showing 0 to 0 of 0 entries

Job Number	Project Title	Created By	Created On
No data available in table			

Customizing your dashboard view

1. To minimize or expand a section, click the lightbulb  on the lower right of the My Projects list.
2. Click the Show entries dropdown:  to expand your view to 10, 25, 50, or 100 entries on the Dashboard.



3. To sort a column on the Dashboard, click the column header.
4. To filter results in a column, type the first few letters of the information you are looking for.
5. You can sort by date also. Click the Due Date header to change the sort order to Ascending or Descending.
6. To reorder the tabs on the Dashboard, simply drag and drop the tab into the desired position.

csCM Menu

Above the dashboard are links to other areas of the Collateral Management Module®:

CollateralManagement module

Welcome Stephen Billias
Profile | Admin | Help

1553

Home Projects Rules Library Inventory Reports Archives Search Regulatory Rules Admin

New Project Projects Schedule Templates New Schedule Template Search Projects

Projects

Job Number	Title	Media Type	Status	Due Date	# Tasks Completed
70	Schedule Template Apply AV CM Test...	EOC	Approved	3/31/2016	0/3
69	Test1	ANOC	Approved	2/25/2016	0/3
68	Brand new schedule template - edited	Direct Mail	Approved	2/25/2016	0/1
67	Tom Tester Project for TM and PM As...	EOC	Submitted	3/31/2016	0/3
66	AV CM Test Project	EOC	InProgress	3/31/2016	1/3

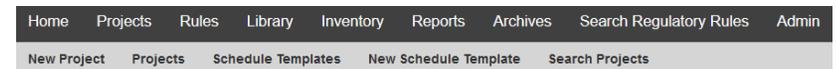
Showing page 1 of 11

We will be performing maintenance on the CodySoft servers every morning at 4 AM ET. If you are working at that time, please save your work and exit the application. Maintenance will take 10 minutes or less. Thank you.

Home Projects Rules Library Inventory Reports Admin Help

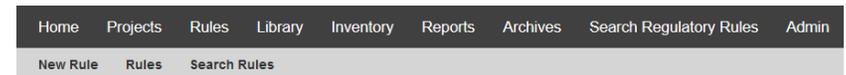
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1. **Home** –Returns you to the csCM dashboard. If you pause the pointer on this link, the **Main Dashboard** Link appears. Click **Main Dashboard** to go to the CodySoft® platform dashboard, where you can launch other CodySoft® modules your company has licensed. For more information on these modules, please contact your CodySoft® administrator.
2. **Projects** – Takes you to a list of active projects. If you pause the pointer on this link, you can access other Project links:



- a. **New Project** – to create a new Project
- b. **Projects** – to display the list of your project
- c. **Schedule Templates** – to see the list of existing schedule templates
- d. **New Schedule Template** – to create a new schedule template
- e. **Search Projects** – to search for a project

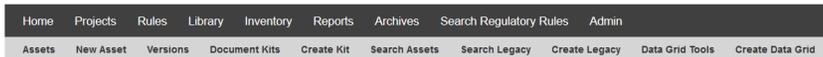
3. **Rules** – Takes you to a list of the rules that have been created for use within the CodySoft® editor. If you pause the pointer on this link, you can access other Rules links:



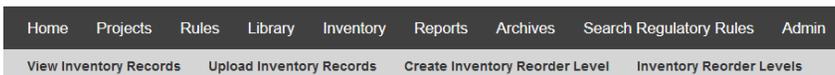
- a. **New Rule** – to create a new rule
- b. **Rules** – to see the list of existing rules
- c. **Search Rules** – to search for a rule



- 4. **Library** – Takes you to the Collateral Management Module® library of digital assets for use within the application. These assets include images, logos, content, data assets and final versions of documents created with the application. If you pause the pointer on this link, you can access other Library links:



- a. **Assets** – to see the list of existing assets
 - b. **New Asset** – to create a new asset
 - c. **Versions** – to see the list of versioned documents
 - d. **Document Kits** – to see the list of created document kits
 - e. **Create Kit** – to create a new document kit
 - f. **Search Assets** – to search for a particular asset
 - g. **Search Legacy** – to search for uploaded legacy (pre-CodySoft®) materials
 - h. **Create Legacy** – to upload legacy materials
 - i. **Data Grid Tools** – to access the list of existing data grids
- 5. **Inventory** – Takes you to a list of items that have been uploaded into the application for inventory management purposes. If you pause the pointer on this link, you can access other Inventory links:



- a. **View Inventory Records** – to see the list of existing inventory records
- b. **Upload Inventory Records** – to upload new inventory records

- c. **Create Inventory Reorder Level** – to set a level for reordering inventory
- d. **Inventory Reorder Levels** – to see a list of established inventory reorder levels

- 6. **Reports** – Takes you to a list of standard reports that are available in Web and XLSX formats, along with a link to Custom Reports which allows you to create custom reports using the CodySoft® reporting tool, and a Chart Visualizations tab that provides data analytics in graphic formats.
- 7. **Archives** – Takes you to a list of archived projects. If you pause the pointer on this link, you can access other Archive links:



NOTE: The Archives tab is available only to users who have the proper user role in CodySoft®. If you are unsure of your role, please contact your System Administrator.

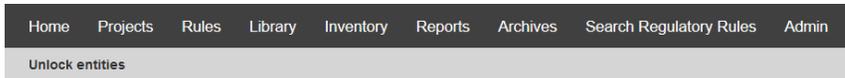
- a. **Projects** – to see a list of archived projects
 - b. **Schedule Templates** – to see a list of archived schedule templates
 - c. **Rules** – to see a list of archived rules
 - d. **Assets** – to see a list of archived assets
 - e. **Final Versions** – to see a list of archived final versions of documents
 - f. **Legacy** – to see a list of archived legacy material
- 8. **Search Regulatory Rules** – Launches the CodySoft® Regulatory Analyzer®, where you can search and update your regulatory rules database.



NOTE: This link is only available to users who have licensed the Regulatory Analyzer®.

- Admin** – Brings you to the admin page, where admin users can manage content and users.

NOTE: The Admin tab is available only to users who have the proper user role in CodySoft®. If you are unsure of your role, please contact your System Administrator.



Notifications

The Collateral Management Module® sends messages to notify you of various project-related activities such as when a project request has been approved, when you have been assigned a project task, or when a discussion has been created for your project. The Collateral Management Module® has a Message Center where you can access all notifications.

Job #	Project Title	Media Type	Status	Due Date	Created By	Created On	# Tasks
739	March 9th Annotate Test	Abridged Formulary	InProgress	3/31/2021	Cory Belden	3/9/2021	3/5
738	Feb 10th Test	Abridged Formulary	InProgress	4/30/2021	Cory Belden	2/8/2021	13/16
737	SBTest011921	EOC	InProgress	1/31/2021	Stephen Billias	1/19/2021	22/27
735	Jan 6th Test	Abridged Formulary	InProgress	3/31/2021	Cory Belden	12/11/2020	30/33

Turning off notification emails

To opt-out of receiving email notifications:

- Click Profile
- In the Edit Settings dialog box, select the *Do not send me system emails* checkbox
- Click Save

If you want to continue receiving notifications, leave this checkbox unselected and add the CodySoft.com domain to your Safe Senders/Recipients lists in Outlook.



Steps in a CodySoft® Project

Follow these general steps to complete a CodySoft® project:

1. Setting up the Project
 - a. Creating a New Project
 - b. Populating the Data Grid
 - c. Uploading the Data Grid
 - d. Populating the Rules Grid
 - e. Uploading the Rules Grid
 - f. Creating an Asset Application Grid (if applicable)
 - g. Uploading the Asset Application Grid (if applicable)
 - h. Populating the Operational Grid (if applicable)
 - i. Uploading the Operational Grid (if applicable)
 - j. Creating Data Assets
 - k. Uploading the Data Assets
2. Creating and Editing the Template
 - a. Creating the Template
 - b. Adding Elements
 - c. Adding Rules
 - d. Testing the Template
3. Reviewing the Project Documents
 - a. Creating individual plan versions
 - b. Creating review tasks
 - c. Updating Template based on review comments

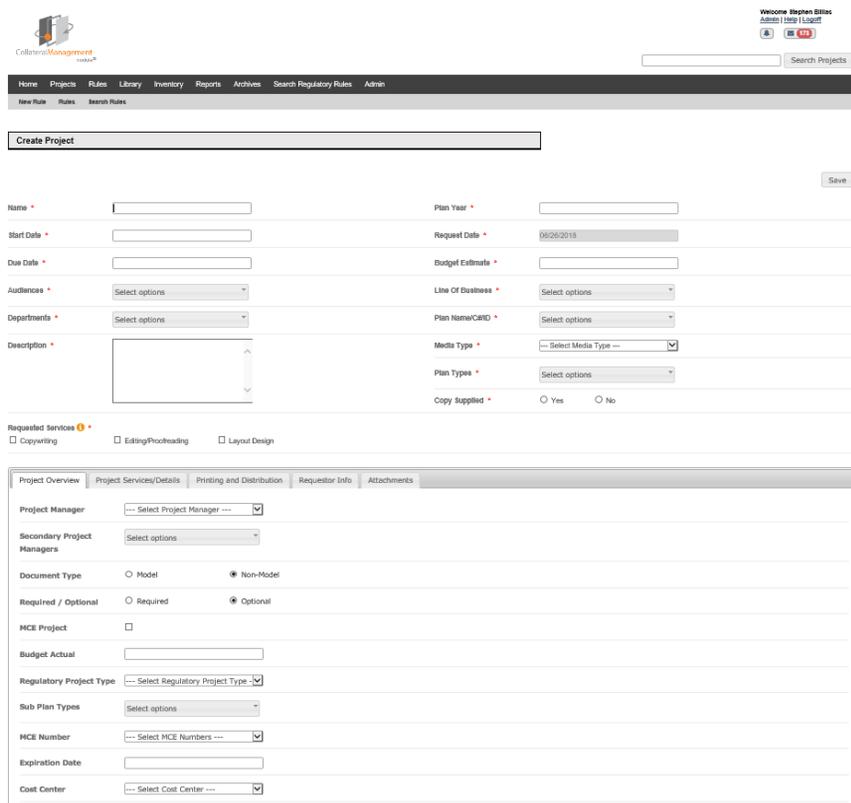
4. Completing the Project
 - a. Creating a Compliance Record
 - b. Archiving the Project

This Quick Start Guide covers these project steps at a high level. See the *CodySoft® User Guide* at <https://support.codysoft.com/kb/a20/codysoft-user-guide.aspx> for more details on all the steps identified in this list.

Setting up the Project

Creating and submitting a draft project

1. From the dashboard, click **New Project** link on the right side of **My Projects**. The Create Project page displays:



NOTE: Items on the form with **red asterisks (*)** are required fields.

2. On the **Create Project** page, enter the following information:
 - a. **Name** – Enter a **Name** for the project
 - b. **Plan Year** – Enter the plan year covered by the communication.
 - c. **Start Date** – Enter the project start date using the calendar widget
 - d. **Due Date** – Enter a project Due Date using the calendar widget
 - e. **Audiences** – Select your material’s audience from the drop-down list.
 - f. **Line of Business** – From the drop-down list, select the checkboxes for the **lines of business** that apply to this project.
 - g. **Departments** – Select the appropriate departments from the drop-down list.
 - h. **Plan Name/C#/ID** – From the drop-down list, select the checkboxes for the **contract numbers** that apply to this project.
 - i. **Description** – Enter a brief **Description** of the project
 - j. **Budget Estimate** – Enter a preliminary budget number. When the project is complete, come back to this tab and enter the final budget amount in this field.
 - k. **Request date** – This is the date you are submitting your request. It is an auto-generated field.

- l. **Media Type** – From the drop-down list, select the **Media Type** for this project.
- m. **Copy Supplied** – Select the Yes option if written copy is included in the request (If you select Yes but do not attach any copy in the **Attachments** tab, you receive a reminder to do so.)
- n. **Plan types** – Select the plan types from the drop-down list (for example, *Classic Gold HMO MAPD*).
- o. **Requested Services** – Select all requested services required for the creation of your material. Note that you can select Other and enter your own requested service.
- p. Optionally click **Add Attachment** on the Attachments tab below to attach any relevant documents that apply to this project. For example, if you choose Copy Supplied=Yes you must upload material for the project as an attachment.
- q. If known, select the **Project Manager** on the Project Overview tab below. Select the user responsible for managing the day-to-day details of this collateral material project from the drop-down list. You can do this now or after you save the project. The project must have a project manager to be approved. The Traffic Manager is responsible for selecting the project manager if none is selected here.
- r. Click **Save**. The project is created with an auto-assigned number and placed in Submitted status.

You will receive a notification email from CodySoft® that your project request has been submitted for review and approval. The Traffic Manager or Project

Manager handles project requests.

Populating the Data Grid

CodySoft® supplies you with a standard Excel spreadsheet data grid template for capturing variable benefit information for use in the Collateral Management Module.

Example:

	A	B	C	F	G
1			PlanName	004(H9999)	004(H9999)
2		Year	Variant	2015	2016
3	2016 PBP Section	Field Description	Attribute		
4	Section B		B		
5	1a Inpatient Hospital Acute	IP hosp acute - IN MC (cost/day intervals) [stay/day]	IPHA_IN	Days 1-7: \$300 copay per day Days 8-90: \$0 copay per day	Days 1-4: \$395 copay per day Days 5-90: \$0 copay per day

For each benefit, you enter the value for the previous year and the current year in the appropriate cells. The values are identified as attributes. For example, the attribute IPHA_LRD_IN in column C in the preceding figure is the name that you insert as an element in the template to retrieve the data in the cells in the plan columns, based on rules you create and apply to the attribute in the template. Once you have populated the data grid with values, you upload the data grid to CodySoft® and create rules to insert the values in the data grid into your template. The CodySoft®-supplied template has an initial set of attributes, and the template is customizable. See <https://support.codysoft.com/kb/a19/cody-consulting-anoc-eoc-data-grid-creation-notes.aspx>

Uploading the Data Grid

You upload the data grid just like any other asset. See *Adding a New Asset to the Library*.

Populating the Rules Grid

To manage your rules, you can set up a Rules Grid. The Rules Grid is an Excel spreadsheet like the Data Grid. The Rules Grid is set up with a list of rules in one column, the plans in columns to the right of the rules, and x's in the plan columns denoting which rules apply to which plans. Because the Rules Grid is an Excel document, you can't edit it in CodySoft®, but you can have it open from a local source and re-upload to CodySoft® if you make changes from what is already uploaded in CodySoft®. Here are some guidelines for setting up a Rules Grid:

- Put the PBPs (the plans) in the same column order as they appear in your Data Grid.
- In the attribute row, add the plan type, service area/state, or other information that you choose
- Populate the x's in the plan columns based on the current plan year's data that you have. Update it when you receive new or changed data from the data grid or PBP reports.

Here's a sample portion of a rules grid:

A	B	C	D	E
		PlanName	001(H123	002(H123
		Variant	2018	2018
		Attribute	Ventura	Los A
		Plan_Name	Plan A	Plan B
Rule description	Location in model	Rule		
if members may receive Extra Help from Medicare to help pay for Medicare Rx drug	ANOC 2.6, 1.4.1, ch 5/5 intro	mayExtraHelp	x	x
if plan has optional supplemental benefits	1.4.1, 4.2.2, ch 12	optsupbens	x	

Rules Grid Format

All grids must have this exact text in the following cells before uploading:

1. C1: Plan Name
2. C2: Variant
3. C3: Attribute

Use all **lowercase x's** in the applicable PBP cells. The capitalization of the "x" affects the rules you'll enter in CodySoft®.

Uploading the Rules Grid

Upload your Rules Grid as you would the data grid or any other data asset. See *Adding a New Asset to the Library*.

Alternate Grid Options

Populating the Operational Grid

In addition to the data grid for benefit and copay information, you can set up an Excel spreadsheet as an Operational Grid for capturing other variable information for use in the Collateral Management Module®. This information might be items like addresses, phone numbers, and website URLs that vary from plan to plan, or it might be pieces of text that change from plan to plan, require no special formatting, and can be imported directly from the Excel spreadsheet.

Example:

	A	B	C	D	G
1			PlanName	007(H9999)	001(H9999)
3	Description	Chapter/Section	Attribute	HMO MAPD	HMO-POS MAPD
98	You [insert as applicable: may OR must] choose a Primary Care Provider (PCP) to provide and oversee your medical care	3.1.2	Referralmustmay	In most situations, your network PCP must give you approval in advance before you can use other providers in the plan's network, such as specialists, hospitals, skilled nursing facilities, or home health care agencies. This is called giving you a "referral." For more information about this, see Section 2.3 of this chapter	Your PCP may refer you to other providers in the plan's network, such as specialists, hospitals, skilled nursing facilities, or home health agencies. This is called giving you a "referral." For more information about this, see Section 2.3 of this chapter.

The attribute *Referralmustmay* in column C in the preceding example is the attribute name that you insert in the template to retrieve the data in the cells based on rules you apply to the attribute in the template. In this example, the combination of attribute and rule would put the text in cell D98 in the HMO plan document and would put the different text in cell G98 in the HMO-POS plan document. When you have populated the operational grid with values, you upload the operational grid to CodySoft® and create rules in CodySoft® to insert the values in the operational grid into your template.

Uploading the Operational Grid

You upload the operational grid like any other asset. See *Adding a New Asset to the Library*.

Creating an Asset Application Grid

When you are creating a template in a CodySoft® project, you may create assets that you want to associate with a project. These assets may be Word documents that you want to bring into the template as separate sections, already formatted. They may be other assets such as ID Card images. You create and develop these assets outside of CodySoft®, and then upload them to the Library. See . The Asset Application Grid allows you to associate Rules and Assets to multiple plans from one data source. CodySoft® supplies you with a standard Excel spreadsheet asset application grid template for that gives you a method of assigning data assets to specific plans in the Collateral Management Module®.

1. Open the Asset Application Grid on your local machine
2. Add a row for each Asset you want to use. These may be Word assets, or they may be other types of assets like ID Card images and so forth.
 - a. In the Asset column of each row, enter the **asset name**
 - b. In the Rule column of each row, enter the **rule name**
3. Add a column for each plan in which you want to insert assets. The first four rows in each column include the following information:
 - **PlanName:** The plan number and contract number of the plan, in this format: nnn(Hnnnn)
 - **Variant:** The contract year
 - **Attribute:** The state in which the plan is in effect
 - **Plan_Name:** The full plan name as listed in the data grid, for example: PrimeMedicare Gold HMO
4. In the row for each asset, enter an "x" in the cell for each plan for which you are going to bring the asset into the template.

Example:

	A	B	C	D	E	F	G
1			PlanName	001(H1234)	001(H2345)	007(H2345)	013(H1234)
2			Variant	2016	2016	2016	2016
3			Attribute Plan_Name	Medicare Advantage Plan Name	Medicare Advantage Plan Name2	Medicare Advantage Plan Name3	Medicare Advantage Plan Name4
4							
5	Asset Name	Description	Rule				
6	Plan 1 benefits changes table	Plan 1 ANOC table in section 1.5	Diamond_Bene	x			x
7	Plan 2 benefits changes table	Plan 2 ANOC table in section 1.5	Ruby_Bene		x	x	
8	ANOC SPAP bullet	Bullet for SPAP information for certain plans	ANOC_SPAP	x		x	

In the preceding example, the *Diamond_Bene* rule in cell C6 inserts the asset named *Plan 1 benefit changes table* defined in cell A6 into the plans marked with an “x” in columns D and G. You can customize the asset application grid to set up rules for as many assets and plans as you have in your project.

5. Click **Save** to save your changes
6. **Close** the asset application grid

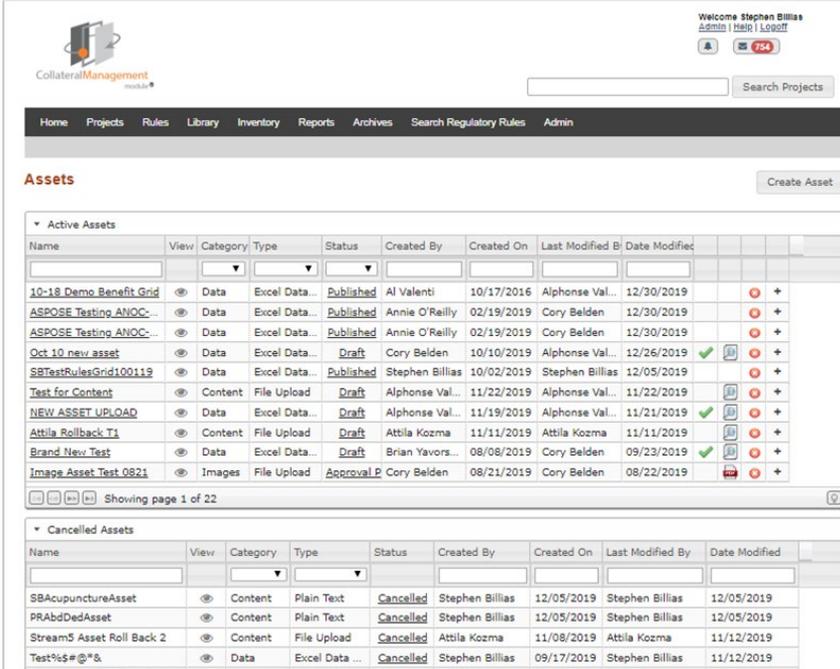
Uploading the Asset Application Grid

You upload the asset application grid like any other asset. See *Adding a New Asset to the Library*.

The Assets screen

The Assets screen provides you with methods for filtering, searching, reviewing, editing, and creating new assets.

From the Library menu, select **Assets**. The Assets screen displays:



The screen provides two work areas:

- Active Asset
- Canceled Assets

From the Assets screen you can create a new asset by clicking **Create Asset**.

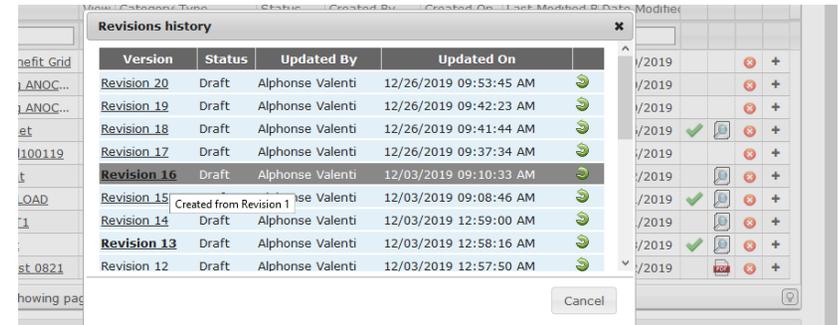
Active Assets area

The Active Assets area of the Asset screen provides the following columns and their associated functionality:

- **Name** — Click the underlined document name to access the Edit Asset screen.
- **View** — Indicates if the asset is editable (the pencil editing icon) or read only (the eye icon). Click the appropriate icon to open the asset for editing or to view in read only mode.
- **Category** — Displays the Asset Category selected when the asset was created
- **Type** — Displays the Type selected when the asset was created
- **Status** — Displays the Status of the asset:
 - Draft
 - Approval Pending
 - Approved
 - Published
- **Created By** — Displays the name of the person who created the asset
- **Created On** — Displays the date the asset was created
- **Last Modified By** — Displays the name of the person who last edited the asset
- **Date Modified** — Displays the date the asset was last edited
- **Validate** — Click the green arrow  to validate that the asset contains no errors
- **Review icon** — Click the review icon to send a document for review and approval
- **Cancel icon** — Click the cancel icon to cancel the asset
- **Plus sign (+) icon** — Click the plus sign (+) icon to view previous

versions of the asset and roll back if necessary.

NOTE: You can roll back an asset to any previous revision. The Revisions history screen displays revision(s) that have been created from a prior revision in bold and identifies the prior revision number from which they were created.

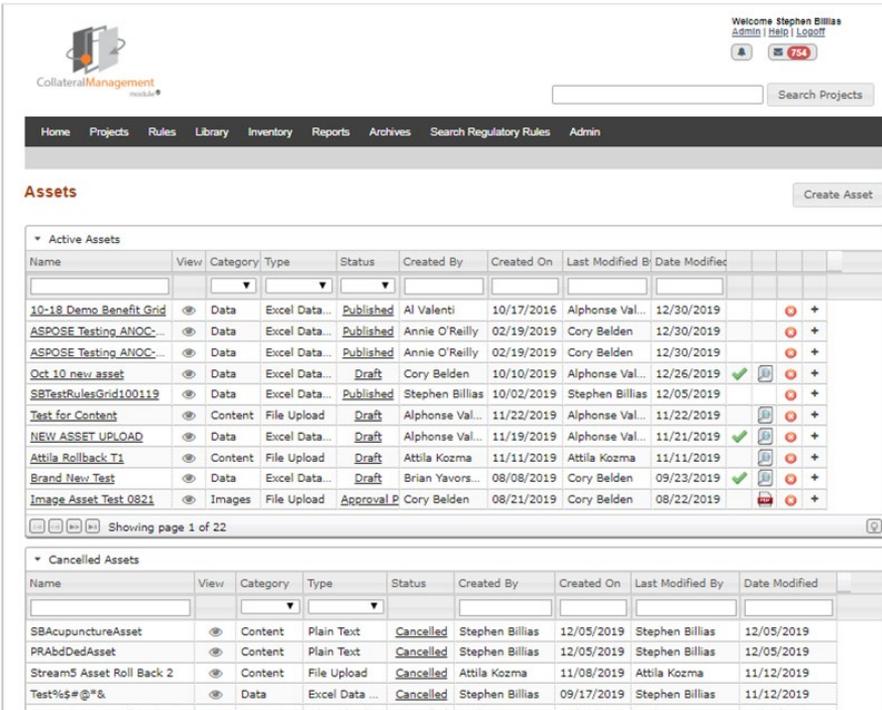


Version	Status	Updated By	Updated On	
Revision 20	Draft	Alphonse Valenti	12/26/2019 09:53:45 AM	
Revision 19	Draft	Alphonse Valenti	12/26/2019 09:42:23 AM	
Revision 18	Draft	Alphonse Valenti	12/26/2019 09:41:44 AM	
Revision 17	Draft	Alphonse Valenti	12/26/2019 09:37:34 AM	
Revision 16	Draft	Alphonse Valenti	12/03/2019 09:10:33 AM	
Revision 15	Created from Revision 1	Alphonse Valenti	12/03/2019 09:08:46 AM	
Revision 14	Draft	Alphonse Valenti	12/03/2019 12:59:00 AM	
Revision 13	Draft	Alphonse Valenti	12/03/2019 12:58:16 AM	
Revision 12	Draft	Alphonse Valenti	12/03/2019 12:57:50 AM	

NOTE: A blank row underneath the column name indicates that you can search and filter on those columns. You can filter on multiple columns to find an asset or a group of similarly named assets.

Adding a New Asset to the Library

1. From the Library choices, select **Assets**. The Assets screen displays.



Name	View	Category	Type	Status	Created By	Created On	Last Modified By	Date Modified
10-18 Demo Benefit Grid		Data	Excel Data...	Published	Al Valenti	10/17/2016	Alphonse Val...	12/30/2019
ASPOSE Testing ANOC...		Data	Excel Data...	Published	Annie O'Reilly	02/19/2019	Cory Belden	12/30/2019
ASPOSE Testing ANOC...		Data	Excel Data...	Published	Annie O'Reilly	02/19/2019	Cory Belden	12/30/2019
Oct 10 new asset		Data	Excel Data...	Draft	Cory Belden	10/10/2019	Alphonse Val...	12/26/2019
SPTTestRulesGrid100119		Data	Excel Data...	Published	Stephen Billias	10/02/2019	Stephen Billias	12/05/2019
Test for Content		Content	File Upload	Draft	Alphonse Val...	11/22/2019	Alphonse Val...	11/22/2019
NEW ASSET UPLOAD		Data	Excel Data...	Draft	Alphonse Val...	11/19/2019	Alphonse Val...	11/21/2019
Attila Rollback T1		Content	File Upload	Draft	Attila Kozma	11/11/2019	Attila Kozma	11/11/2019
Brand New Test		Data	Excel Data...	Draft	Brian Yavors...	08/08/2019	Cory Belden	09/23/2019
Image Asset Test Q821		Images	File Upload	Approval P	Cory Belden	08/21/2019	Cory Belden	08/22/2019

Name	View	Category	Type	Status	Created By	Created On	Last Modified By	Date Modified
SBAcupunctureAsset		Content	Plain Text	Cancelled	Stephen Billias	12/05/2019	Stephen Billias	12/05/2019
PRAbdDedAsset		Content	Plain Text	Cancelled	Stephen Billias	12/05/2019	Stephen Billias	12/05/2019
Stream5 Asset Roll Back 2		Content	File Upload	Cancelled	Attila Kozma	11/08/2019	Attila Kozma	11/12/2019
Test%\$#@*&		Data	Excel Data...	Cancelled	Stephen Billias	09/17/2019	Stephen Billias	11/12/2019

2. Click **Create Asset**. The **Create Asset** dialog displays:

Create Asset

Name *

Asset Category *

Type *

Status *

Line Of Business *

Description

File to Upload: No file selected.

3. Enter an asset Name
4. From the Asset Category drop-down list, select a category from these choices:
 - **Content** – files for use in CodySoft®, either as File templates for CodySoft® Editor templates, or other asset content files.
 - **Data** – Data files. (The required format for use with rules for the Document Editor: Microsoft Excel.)
 - **Images** – Graphic files for layout. (Required formats for use with rules for the Document Editor include: jpeg, jpg, png, gif and bmp.)
 - **Logos** – Graphic files for your company's identity. (Required formats for use with rules for the Document Editor include: jpeg, jpg, png, gif and bmp.)



Collateral Management module®

5. From the Type field drop-down list, select the asset **Type**. Your choices depend on the Asset Category you have chosen:
 - For Content:
 - File Upload
 - CodySoft® Editor
 - For Data
 - File Upload
 - Excel Data Asset
 - For Images or Logo, Type is File Upload

The **Status** field defaults to **Draft** for Create Asset

6. From the Line of Business drop-down list, select all lines of business that apply to this asset.
7. Enter a brief **Description** of the asset
8. In the File to Upload field, click **Browse**
9. Navigate to the asset
10. Click to select it
11. Click **Open**
12. Click **Save**. The asset appears on the list of assets.

NOTE: Please check your Asset for formatting if you encounter any errors during the upload process. Make sure that formatting is applied only to active cells in your Asset, and not to rows and columns outside the populated area.

Edit an Asset

To edit an asset:

1. Click the document name
2. On the Edit Asset screen, click Edit Document

3. Edit the document
4. Click Save
5. Close the document

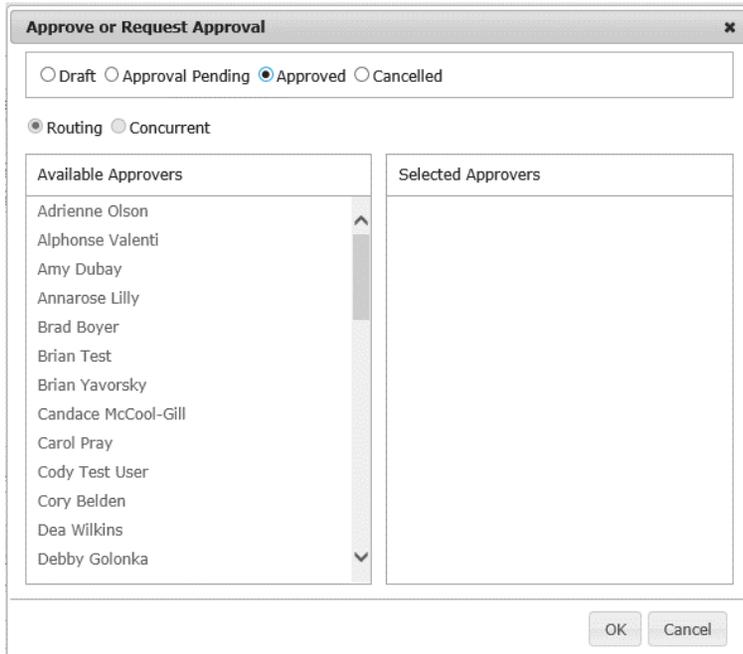
NOTE: If you edit an asset in Published status it moves back to Draft status automatically. Previous versions and their status are kept in CodySoft®. Click the plus sign (+) to view versions

Send an Asset for Review

To send an asset for review:

1. Click the review icon on any asset in Draft status.
2. Change the **Status** to **Approval Pending**
3. Identify the **Approval Method**, either Concurrent or Routing

4. Select approvers from the list:



NOTE: the project manager who submits the asset for approval is included automatically as an approver when Approval Pending is selected. The project manager can also approve the document on their own by selecting Approved and clicking OK without selecting any other approvers.

5. Click **OK**. The document now displays as Approval Pending on the Assets tab.

Review an asset

1. To review and edit an asset, click the PDF file icon  for the asset.
2. Review the document and add comments as you would in a Template review.
3. When you have completed your review, close the Review window.

Cancel an Asset

To cancel an asset:

1. Click the red x icon  on any asset. The asset is cancelled and moved from the Active tab to the Cancelled tab on the Assets screen.

You can also cancel an asset by this method:

1. Click the review icon on any asset
2. Change the Status to **Cancelled**. Do not select any approvers.
3. Click **Ok**. The asset is moved to the Cancelled assets list.

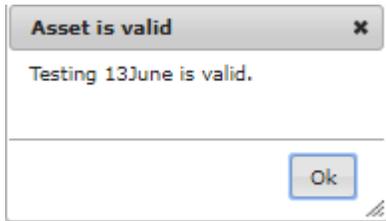
Notes on cancelling assets:

- You cannot cancel an asset in Pending Approval status.
- If you try to cancel a Published asset that is in use in one or more projects, you will get a message listing those projects.

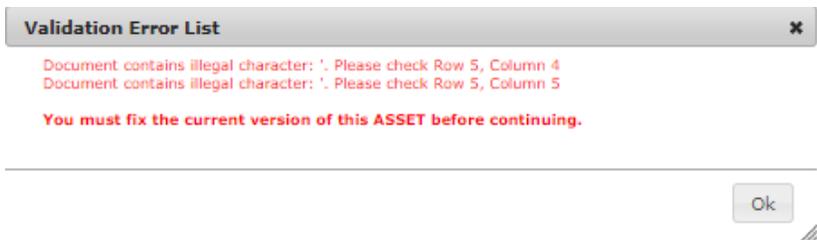
Validate an Asset

To validate the correctness an asset before it is published:

1. Click the green arrow  on the row for any asset. If the asset is correct, you'll receive a confirmation message:



If the asset contains errors, you'll receive an error message with detail on where you need to edit the asset to make correct t, as in this example message

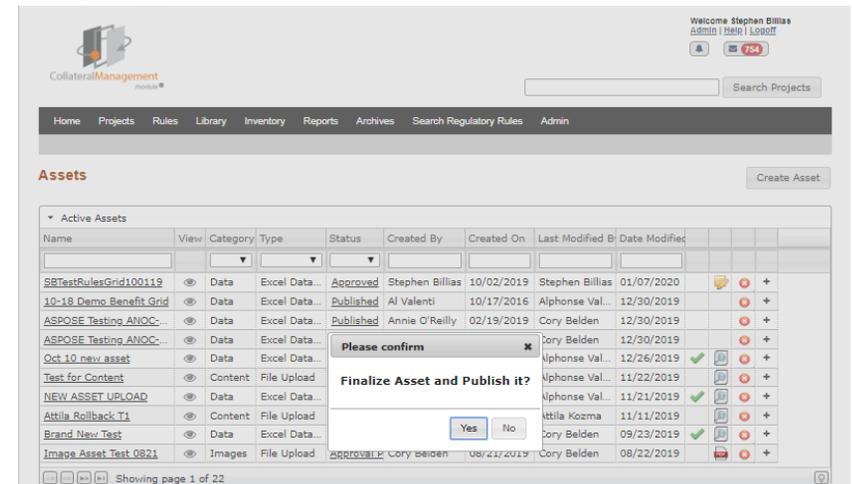


2. Edit the asset and select the green validation arrow again to re-validate.

Publish an Asset

To publish an asset after it has been approved:

1. Click the version icon  on any approved asset. A confirmation dialogue appears:



2. Click **Yes** to publish the asset and make it available for use in projects.

Working in the Template

Adding a New Template

You can add three types of templates to a Collateral Management Module® project:

- File
- CodySoft® editor
- Excel



This guide explains how to access each of the three types of templates, edit the templates, and save them to the CodySoft® server.

To add a new template:

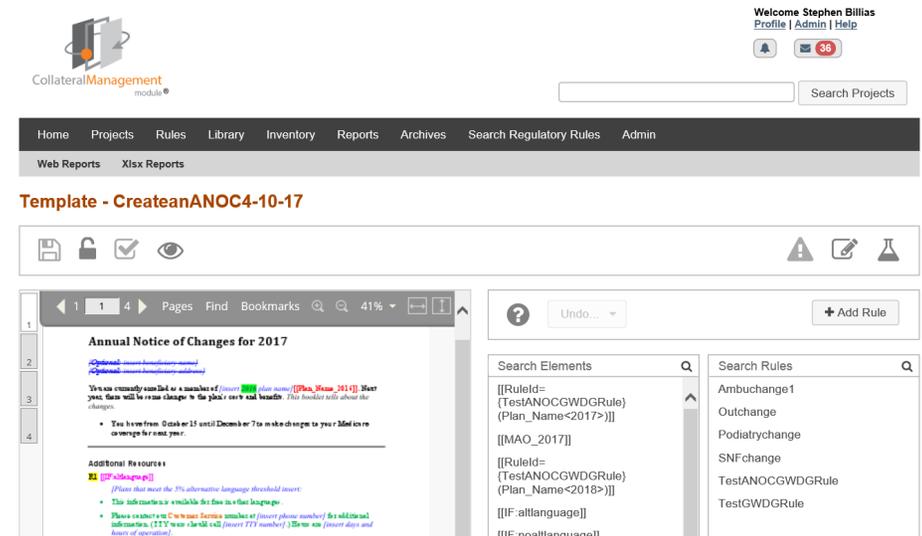
1. From the home page of a project, click the Templates tab.
2. Click **Add Template**
3. Enter the following information:
 - a. **Name** – give the template a name
 - b. **Type** – from the drop-down list, select the type of template you are creating—File, CodySoft® Editor, or Excel.

Note: If you are going to use this document to add elements and rules, select **CodySoft® Editor**

- c. **Plan Number** – From the drop-down list, select the plan number of the plan for which this will be the template
4. **Browse** to the file you want to upload
5. Click to select it
6. Click **Open**
7. Click **OK**. The new template appears in the template list.

Viewing and editing a CodySoft® Editor Template

1. Click the filename of the template you wish to access. The following screen displays:



The toolbar icons across the top of the template editor page are as follows:

-  Save template
-  Unlock Template and Return to Project
-  Complete review (for use on the Review process only; not enabled on the template editor screen)
-  View file (read only)
-  Show validation errors
-  Edit Template
-  Test the Template

2. Click the **Edit Template** icon.

NOTE: Once you open the template document, this document is available in Read-Only view only for other users. To unlock this template, save and close the file and click the **Unlock Template and Return to Project** icon.

3. Make edits to your documents.

4. Click **Save**.

5. Close the file.

6. Click the **Unlock Template and Return to Project** icon

Navigating on the template editor screen

Use the navigation toolbar to move easily through the document:



- Use the left and right arrows to go forward and backward
- Enter a page number to jump to that page
- Click **Pages** to view a screen of thumbnails and jump to any page via the thumbnail
- Click **Find** to find and go to text in the document
- Click **Bookmarks** to find Bookmarks and go to them
- Click the magnifying glasses to zoom in or out on the page
- Use the percentage dropdown to change (zoom) the screen image size
- Click the horizontal double arrow icon to Fit Width
- Click the vertical double arrow icon to Fit Page
- Use the list of page numbers down the left side to go to a specific page

Fixing Validation Errors

If your template has validation errors, you can access and fix them from the template editor screen.

1. Click  Show validation errors. The list of validation errors displays:

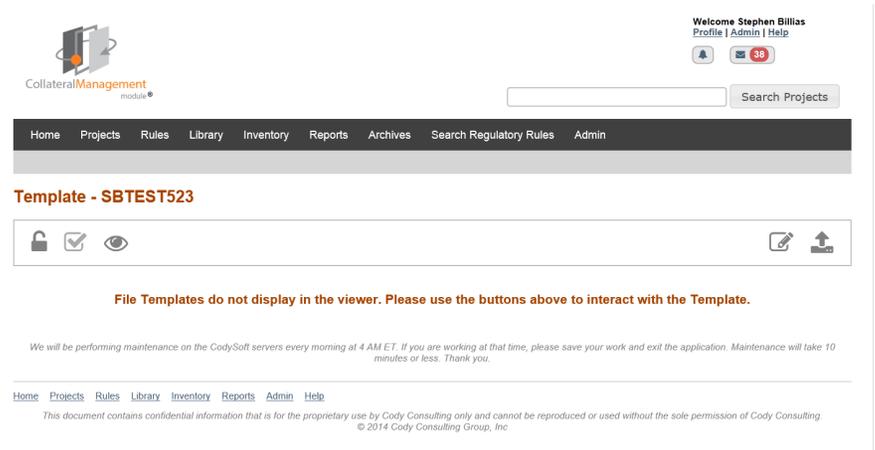
Validation errors		
Description	Occurred (times)	Page(s)
Invalid attempt to insert Rule [[IF:HMO]] within rule with same id	1	14
Open/Close elements pair order mismatched, the expected is [[ENDIF:POS]] closing element for opening [[IF:POS]] element instead of [[ENDIF:HMO]] that has been found.	1	14
Can't find [[ENDIF:HMO]] element's pair for [[IF:HMO]] element	2	14

Ok Download

2. Click the page number to go to the page number in the PDF view on the left side of the template editor screen.
3. Review the page and identify the errors and then edit the template to correct them.
4. Alternately, click Download to download the list of validation errors in an Excel .csv file that you can use or save for making future corrections to the template.

Editing a File Template

1. Click the template name to open the file template screen.
NOTE: Once you open the File template document, this document will only be available in Read-Only view for other users. To unlock this template, you must save and close the file.



The screenshot shows the CollateralManagement interface. At the top right, it says "Welcome Stephen Billias" with links for "Profile", "Admin", and "Help". Below this is a search bar and a "Search Projects" button. The main navigation bar includes "Home", "Projects", "Rules", "Library", "Inventory", "Reports", "Archives", "Search Regulatory Rules", and "Admin". The current page is titled "Template - SBTEST523". Below the title, there are icons for a lock, a checkmark, an eye, and an upload icon. A message states: "File Templates do not display in the viewer. Please use the buttons above to interact with the Template." At the bottom, there is a maintenance notice: "We will be performing maintenance on the CodySoft servers every morning at 4 AM ET. If you are working at that time, please save your work and exit the application. Maintenance will take 10 minutes or less. Thank you." The footer contains navigation links and a copyright notice: "© 2014 Cody Consulting Group, Inc."

2. Click the Edit Template icon to edit the document
3. Make edits to your documents.
4. Click **Save** in your document.
5. Close the file. Your changes are saved and uploaded to the CodySoft® server.

NOTE: If you have made changes to a local copy of the template, you can replace the existing template instead of editing it, by clicking the “Upload

Replacement Template” icon .

Viewing and editing an Excel Template

1. Click the pencil icon  to open the Excel file.
NOTE: When you open the Excel template document, it is available in Read-Only mode for other users.
2. Make edits to your Excel document.
3. Click **Save**.
4. **Close** the Excel Document. Your changes are saved and uploaded to the CodySoft® server.
5. Click **Unlock Template and Return to Project**

Adding Elements

In your CodySoft® Editor template, you create elements using the attribute names you established in your data grid, rules grid, operational grid, and asset application grid. You can copy and paste attribute names directly from your grids to use as element names in the template.

1. From the dashboard, select the project that contains the template you want to edit
2. From the home page of the individual project click the **Templates tab**
3. From the list of templates, click the **Name** of the template you want to edit. The template appears in a three-column format:

Page 1 of the current template in the left column	The list of Elements on the current page in the center column	The list of Rules in the right column
---	---	---------------------------------------

4. Click **Edit Template**
5. **Open** the document in Word when prompted

6. Click **Enable Editing** if prompted
7. Navigate to the page where you want to add elements to the template.
8. Add elements from your data grid, rules grid, or operational grid. The format for these elements is to surround them with double brackets. For example, if your data grid attribute is Plan_Name, you would create an element called [[Plan_Name]] in your CodySoft® template.
9. **Save** the document in Word
10. **Close** the document
11. Click **Save**

Creating CodySoft® content using IF statements

IF Statement Concept

Using IF statements, document creators and reviewers can see all content embedded in the template, including variations by plan.

NOTE: If you are a CodySoft® user already and you want to continue working as you do currently, using an operational grid and assets to store content rather than using IF statements to have the content appear in the template, the system will continue to work that way and you don't have to use the IF functionality.

IF Statement Syntax

To bring content into a CM template, you surround the desired content with a pair of IF/END IF tags that tell the system to insert this content when rule conditions are met. Then you create rules to specify the conditions and apply them just as you would to other elements in a CodySoft® template.

The content within the IF statement pair can be a word or phrase, or it can be a longer, fully formatted piece, for example, a bulleted list or an entire section with a header.

IF statements act like other elements. You can create rules and drag rules onto the IF statements on the template screen, just as you would with any other element. See *Rule Conditions for IF Statements*.

To add content to a template:

1. Add an IF element pair with the syntax `[[IF:RuleName]]CONTENT HERE[[ENDIF:RuleName]]`
2. Create the Rule. See *Rule Conditions for IF Statements*
3. On the template screen, drag the rule onto the IF element. The `[[IF:RuleName]]` now reads `[[IF:RuleId={xxx}]]` and `[[ENDIF:someruleName]]` is also replaced to read `[[ENDIF:RuleId={xxx}]]`

NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to search for it. For example, if you are applying a rule to the element `Plan_Name`, the dialog filters and displays as in this example:



4. Click **OK** to use the selected element. The mapping must be an exact match or else an error message displays.

5. Click the Commit Changes icon  to save your changes

The content in the template either appears in the plans you generate or does not appear, based on the conditions you set in the rule. See *Rule Conditions for IF Statements*.

Here's an example of two IF statements in a template, with the rules applied, to bring in bulleted lists with different text:

2017 Evidence of Coverage for Generic Medicare Plan Chapter 1 → Getting started as a member ¶

- Medicare Part A generally helps cover services provided by hospitals (for inpatient services, skilled nursing facilities, or home health agencies).
- Medicare Part B is for most other medical services (such as physician's services and other outpatient services) and certain items (such as durable medical equipment and supplies).

Section 2.3 → What is Pennsylvania Medical Assistance (Medicaid), Ohio Medicaid, North Carolina Medical Assistance (Medicaid) and Kentucky Medicaid?

Pennsylvania Medical Assistance (Medicaid), Ohio Medicaid, North Carolina Medical Assistance (Medicaid) and Kentucky Medicaid are joint Federal and state government programs that help with medical and long-term care costs for certain people who have limited incomes and resources. Each state decides what counts as income and resources, who is eligible, what services are covered, and the cost for services. States also can decide how to run their program as long as they follow the Federal guidelines.

In addition, there are programs offered through Pennsylvania Medical Assistance (Medicaid), Ohio Medicaid, North Carolina Medical Assistance (Medicaid) or Kentucky Medicaid that help people with Medicare pay their Medicare costs, such as their Medicare premiums. These "Medicare Savings Programs" help people with limited income and resources save money each year.

[[IF:RuleId={FBDE}]]

- **Qualified Medicare Beneficiary (QMB):** Helps pay Medicare Part A and Part B premiums, and other cost-sharing (like deductibles, coinsurance, and copayments). (Some people with QMB are also eligible for full Medicaid benefits (QMB+)).
- **Specified Low Income Medicare Beneficiary Plus (SLMB+):** Helps pay Part B premiums and eligible for full Medicaid benefits. [[ENDIF:RuleId={FBDE}]]

[[IF:RuleId={nonFBDE}]]

- **Specified Low Income Medicare Beneficiary (SLMB):** Helps pay Part B premiums.
- **Qualifying Individual (QI):** Helps pay Part B premiums.
- **Qualified Disabled & Working Individuals (QDWI):** Helps pay Part A premiums. [[ENDIF:RuleId={nonFBDE}]]

IF Statement Variations

You can create several variations of IF statements in your template.

Nested IF statements

You can have nested IF statements. For example:

January 1 – December 31, 2017

Evidence of Coverage:

Your Medicare Health Benefits and Services and Prescription Drug Coverage as a Member of [[RuleId={AV2016DC}(Plan Name<2017>)] SM (HMO/SNP)]

This booklet gives you the details about your Medicare health care and prescription drug coverage from January 1 – December 31, 2017. It explains how to get coverage for the health care services and prescription drugs you need. **This is an important legal document. Please keep it in a safe place.**

[[IF:RuleId={smoking1}]] Sample content. [[IF:RuleId={smoking2}]] **More sample content.** [[ENDIF:RuleId={smoking2}]] This is a lot more content for smoking 1 that needs to be above and below the smoking 2 content. [[ENDIF:RuleId={smoking1}]]

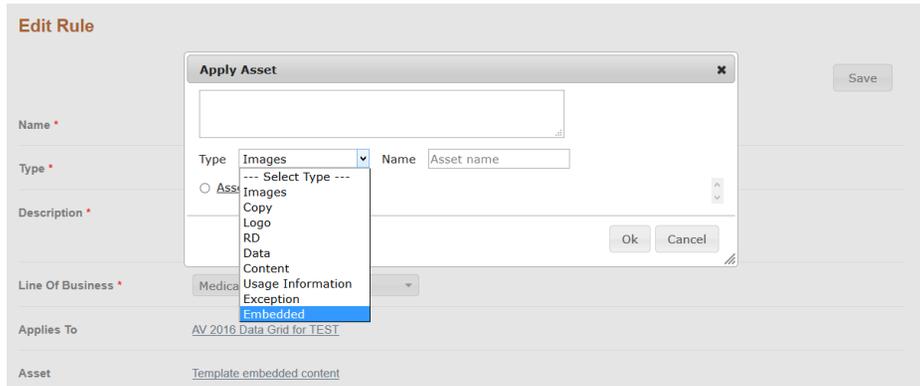
IF statements on a single line

If you need to replace a single word or a short phrase in a sentence instead of inserting a longer piece of content, you can use an IF statement. Here's an example:

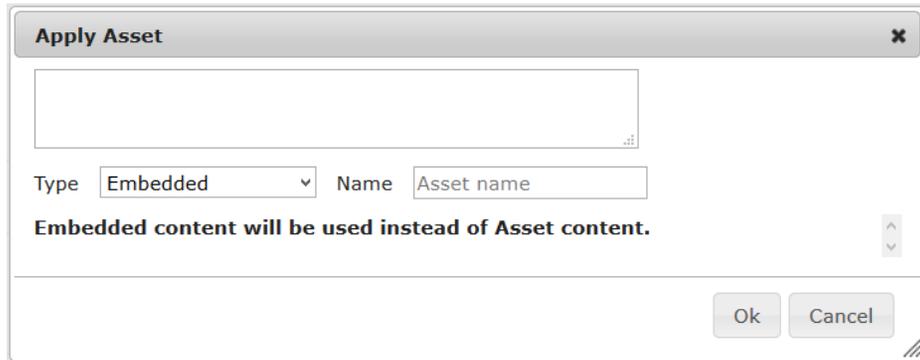
Our plan [[IF:RuleId={FBDE}]] also [[ENDIF:RuleId={FBDE}]] provides coverage for

Rule Conditions for IF Statements

To set up a rule to use content within an IF statement, create the rule as you would any other rule, with the following exception: in the Asset field, instead of selecting the Asset, select Embedded to indicate that the asset is embedded in the template. See also *Creating CodySoft® content using IF statements*



The confirmation message displays:



Set the conditions for the rule as you normally would. For example, you can use the rule to identify when to include the asset in a document by Plan Name or

Plan ID.

Creating Rules

In CodySoft® you create rules that you apply to elements in your template to insert data from your data grid, rules grid, operational grid, or assets from your asset application grid. This combination of elements and rules is the method of retrieving information from these grids.

There are two types of rules in CM:

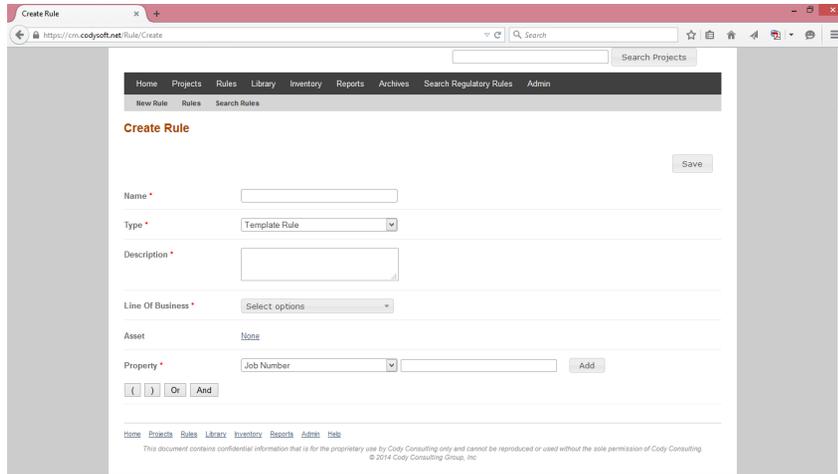
- **Template rules**—are used to bring in data for a specific attribute. There is one template rule for each attribute. See *Creating a Template Rule*.
- **Data Asset rules**—are used to bring in data from a grid for a variety of attributes. For example, you may have a rule that can be used to bring in any number of different attributes from a data grid, or embedded content for a variety of rules in a rules grid. See *Creating a Data Asset Rule*.

Rules Wizard

CodySoft® also provides a Rules Wizard for creating multiple rules at one time from a template. For detailed instructions on the use of the Rules Wizard, please see the full *CodySoft Collateral Management User Guide* in the Knowledge Base on the Cody Support portal.

Creating a Template Rule

- From the CodySoft Editor screen in the Templates tab, click **Add Rule**. The Create Rule screen displays:



- Enter a rule **Name**. (Use letters and numbers only—do not use any special characters such as dashes)
- From the Type field drop-down list, select **Template Rule** to use the rule in your template
- Enter a brief **Description** of the asset
- Select all lines of business that apply to this asset.
- In the **Asset** field, leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset:
 - Click **None**
 - From the Type field, click the asset type, for example, Data. You can filter on the list of available assets by entering the first letter(s) of the asset name in the Name field.

- Select the option button next to the to the asset you want to use
- Click **OK**. The asset name displays in the Asset field

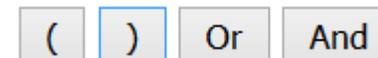
- From the first Property field drop-down list, select the property to which the asset applies. The pull-down list displays the default list of **project properties** such as Start Date, Requested By, and Media Type.
- In the second Property field, enter the condition you want to set for that value for the property, or select it from a drop-down list. For example, if you chose Media Type as the property in the first Property field, select a Media Type that you wish to set as your condition (such as “EOC”) from the drop-down list in the second Property field so that Property = “Media Type” and Media Type=“EOC”.
- Click the **appropriate modifier** for your property.



In this example, you would select Equal To. As soon as you chose the modifier, the condition is set in the rule:

```
Project.MediaType == 'EOC'
```

- Optionally **set additional conditions**, using the modifiers provided to construct each additional condition:



For example, you might have a condition that reads: (Line of Business = Medicare **AND** Plan Type = PDP) **AND** Media Type = Flyer

- Build a string of modifiers and properties that create each additional condition.

Project.MediaType == 'EOC'
AND
Project.Audience != 'Broker'
AND
Project.PlanType Contains('MA')

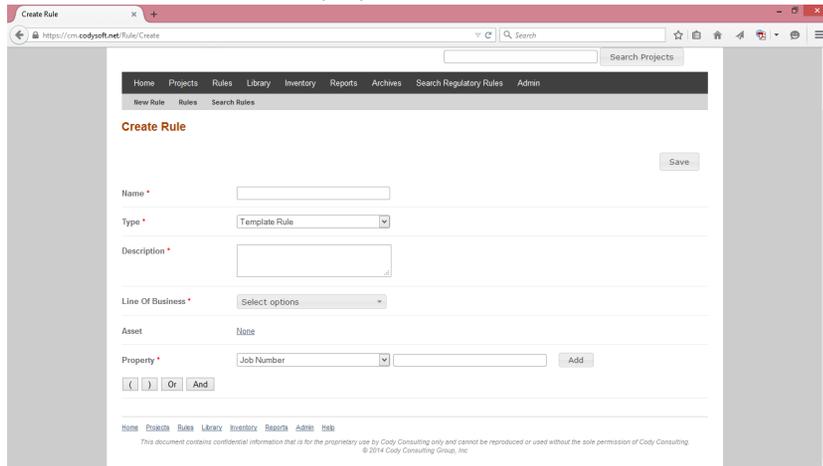
Use the up and down arrows to change the order of your conditions and click the red x circle to delete any conditions you don't want to keep as part of the rule.

12. Click **Save** when you are satisfied with your conditions. Your new rule appears in the list of rules on the Template Editor screen.

Creating a Data Asset Rule

You create data asset rules to apply attributes from data assets to specific plans in your project.

1. From the CodySoft Editor screen in the Templates tab, click **Add Rule**. The Create Rule screen displays:

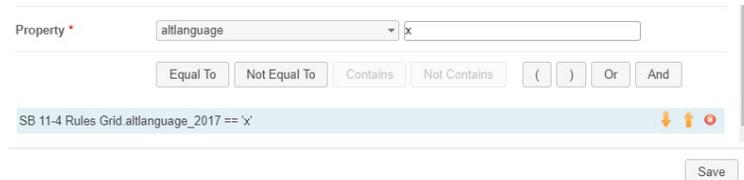


1. Enter a rule **Name**. (Use letters and numbers only—do not use any special characters such as dashes)
2. From the Type field drop-down list, select **Data Asset** to apply the rule against an item in your data grid, operational grid, asset application grid, or rules grid.
3. Enter a brief **Description** of the asset
4. Select all lines of business that apply to this asset.
5. In the **Applies to** field, leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset like a grid with rules you've created to bring in content within IF statements, follow these steps:
 - a. Click **None**
 - b. From the Category field, click the asset type. In most cases, because you chose Data Asset as the Type, this choice is **Data**.
 - c. Select the option button next to the to the asset you want to use
 - d. Click **OK**. The asset name displays in the **Applies to** field
6. In the **Asset** field, leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset:
 - e. Click **None**
 - f. From the Type field, click the asset type, for example, Embedded, which will bring in the variable content that you've placed between IF statements in your template.
 - g. Optionally use the Name field as a filter to reduce the number of assets in the list. For example, if you enter Bene in the Name field, only assets with Bene in the name display
 - h. If you are applying your rule to an asset type instead of using embedded content, select the option button next to the to the asset you want to use

- i. Click **OK**. The asset name or category displays in the **Asset** field
- j. From the first Property field drop-down list, select the property to which the asset applies. The pull-down list displays the list of **attributes** in the data asset that you entered in the Applies To field. For example, if you are creating a rule that uses a rules grid in Applies To, the list will be of the rules in the grid. See *Creating a Rules Grid*.
- k. Use the second Property field to set the conditions for your rule to follow. For example, if you are using a rules grid in Applies To and you chose “alllanguage,” as the property, populate the second property field with whatever marker you used on your rules grid to indicate which plans this rule applies to, for example, you may use a lowercase “x” in the columns for the plans for which this rule applies.
- l. Click the **appropriate modifier** for your property.



In this example, you would select Equal To. As soon as you chose the modifier, the condition is set in the rule:



Property * alllanguage x

Equal To Not Equal To Contains Not Contains () Or And

SB 11-4 Rules Grid.alllanguage_2017 == 'x'

Save

- m. Optionally **set additional conditions**, using the modifiers provided to construct each additional condition.
7. Click **Save** when you are satisfied with your conditions Your new rule appears in the list of rules on the Template Editor screen.

NOTE: From the Rules tab you can copy rules using the Copy to clipboard icon  at the end of each Rule row. See *Add Rules to Project*.

Naming a Rule for Embedded Content Using IF Statements

Rule Name and Beginning Syntax

Rule Name

CodySoft suggests that you use the following naming convention when creating rules. The Rule Name is a combination of **two-digit plan year** (optional) + **plan type abbreviation (see below)** + the **rule name** from Column C of the rules grid.

Plan Type Abbreviations:

Plan Type	Abbreviation
HMO MAPD	H2
HMO MA Only	H1
PPO MAPD	P2
PPO MA Only	P1
DSNP	Dx
PDP	Rx
EGWP	Ex
PFFS	Px

Use the same beginning syntax for all rules associated with each Rules Grid.

Beginning Syntax = two-digit plan year + plan type abbreviation

In this example, the beginning syntax for Generic 2018 HMO MAPD Rules Grid will be **GW18H2**.

Follow the **two-digit plan year** (optional) + **plan type abbreviation** with the rule name from Column C of the rule grid to create the full syntax for each rule name.

NOTE: Do not use spaces or special characters in your rule name.

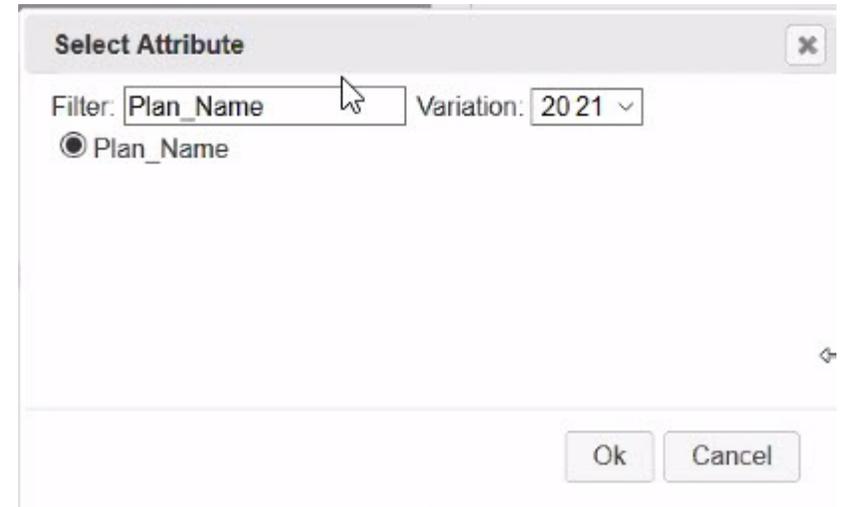
Using Rules

1. From the dashboard, select the project that contains the Cody Editor template you want to edit
2. From the home page of the individual project, click the **Templates** tab
3. From the list of templates, click the **Name** of the template you want to edit. The template appears in a three-column format:

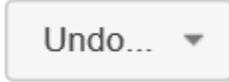
Page 1 of the current template in the left column	The list of Elements on the current page in the center column	The list of Rules in the right column.
---	---	--

4. Navigate to the page with the element to which you want to apply a rule
5. Click and drag the rule from the right column onto the element in the center column or drag the element from the center column onto the rule in the right column. Dragging works the same in either direction.
NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to search for it. For example, if you

are applying a rule to the element Plan_Name, the dialog filters and displays as in this example:



6. Select the **Variation** (plan year) that you want to apply to this element
7. Click **OK**. The mapping must be an exact match or else an error message displays.
8. Scroll down if necessary and click **Test the Template** on the lower right of the page.
9. Verify that the rule has been applied to the element.
10. Click the Save Template icon  to save your changes. Click the

Undo dropdown  if you want to revert to the template's state before you made the changes, for example if you find an error in the way you applied a rule that you don't want to commit to



the template. You can undo changes from the dropdown list one at a time working backwards until you have undone all the changes you want to back out of your edits.

Adding Rules to Project

If you are a project manager, you can add previously created rules to your project. See *Creating Rules* for instructions on how you can create rules in your project.

1. From the Rules tab of your project click **Add Rules to Project**. The **Add Rules to Project** screen displays:

2. Filter your search criteria using the fields provided:

- Name:** Enter the rule name if known
- Type:** Select Template Rule (for Data grid rules) or Data Asset (for IF Statements). See *Creating Rules*.
- Created By:** Select a username to search for rules created by that person

Last Updated By: Enter a username to search for rules edited by that person most recently

Asset: Select asset associated with the rule from a dropdown list of all assets

3. Click **Search**

Your search results display in the table below:

Name	Description	Created By	Last Updated By	Asset	
Test6thrule	Test filter 2nd instance	Stephen Billias	Stephen Billias		+
Test5thRule	Test filter 12-6	Stephen Billias	Stephen Billias		+
Test3rdRule	Test 12/5	Stephen Billias	Stephen Billias		+
Test2ndrule	Test 12/5	Stephen Billias	Stephen Billias		+
Test1stRule	Test 12/5	Stephen Billias	Stephen Billias		+
SBTestsinglebrac...	SBTestsinglebrack	Stephen Billias	Stephen Billias		+
SBTestIF10416	SBTestIF10416	Stephen Billias	Stephen Billias		+
SBTestGWAHang...	Test IF Statement across ...	Stephen Billias	Stephen Billias		+
SBTest51018	Test asset in use and can...	Stephen Billias	Stephen Billias	SBTest51018-1	+

Showing page 1 of 1

4. Click the **plus sign (+)** at the end of the row to add a rule to your project. When you have added all rows you want to add, click **Close**. Your rules display on the Rules tab in the project and are available for use in the Rules column on the Template Editor screen.

Viewing Unassigned Elements

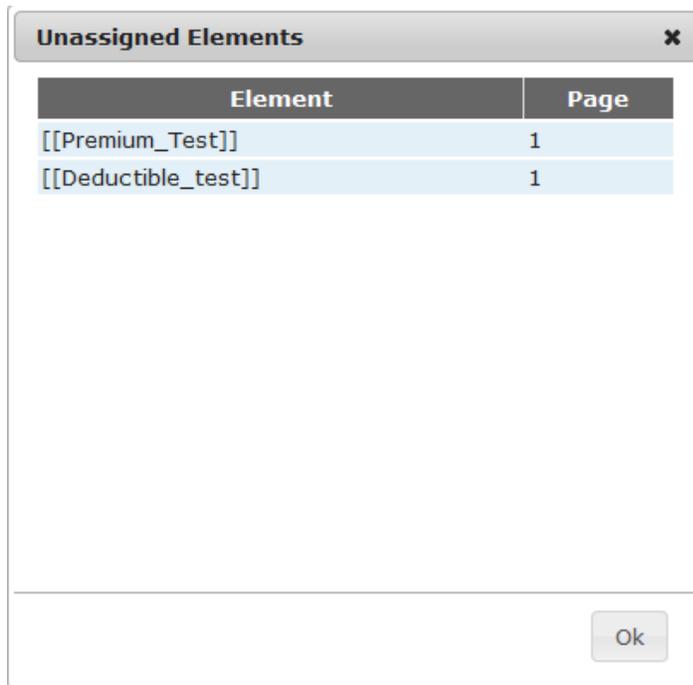
You can run a report that will identify all elements in that template that don't have rules assigned to them. This report allows you to quickly identify and resolve any issues with unassigned elements.

1. From the Edit Template screen, click the **View Unassigned Elements**



icon:

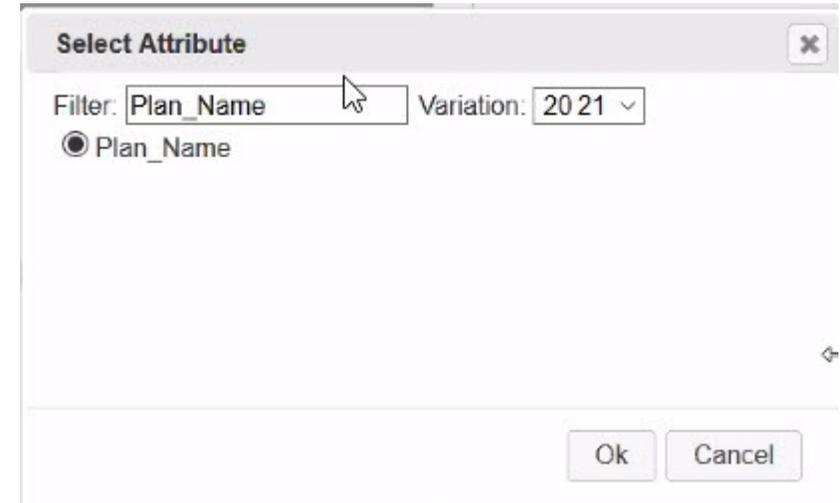
The Unassigned Elements dialog box opens.



2. Click any element in the list to navigate to the page number of the element you want to work on or click **OK** to close the list.
3. On the template editor screen, click and drag the rule from the right column onto the element in the center column, or drag the element

from the center column onto the rule in the right column. Dragging works the same in either direction.

NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to search for it. For example, if you are applying a rule to the element Plan_Name, the dialog filters and displays as in this example:



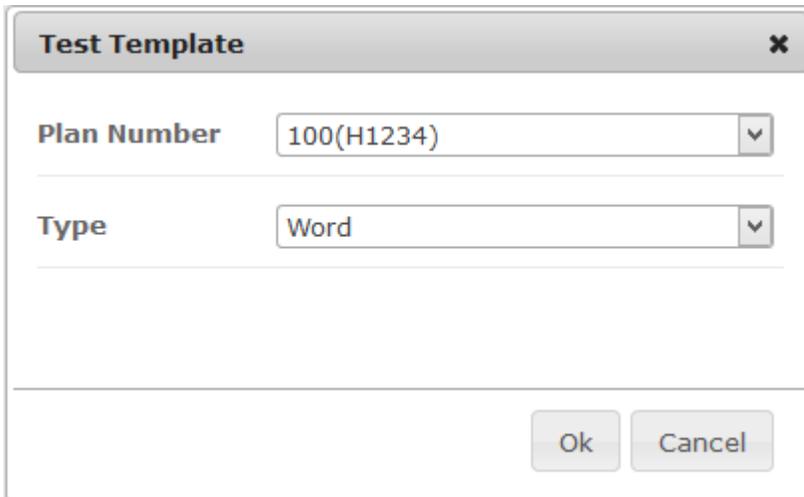
6. Click **OK** to use the selected element. The mapping must be an exact match or else an error message displays.

When you have identified all unassigned elements and assigned rules to them, you are ready to test the template.

Testing the CodySoft® Template

To test a CodySoft® Editor template to validate rule selection and execution:

1. Click the **Test the Template** icon from the template editor screen.

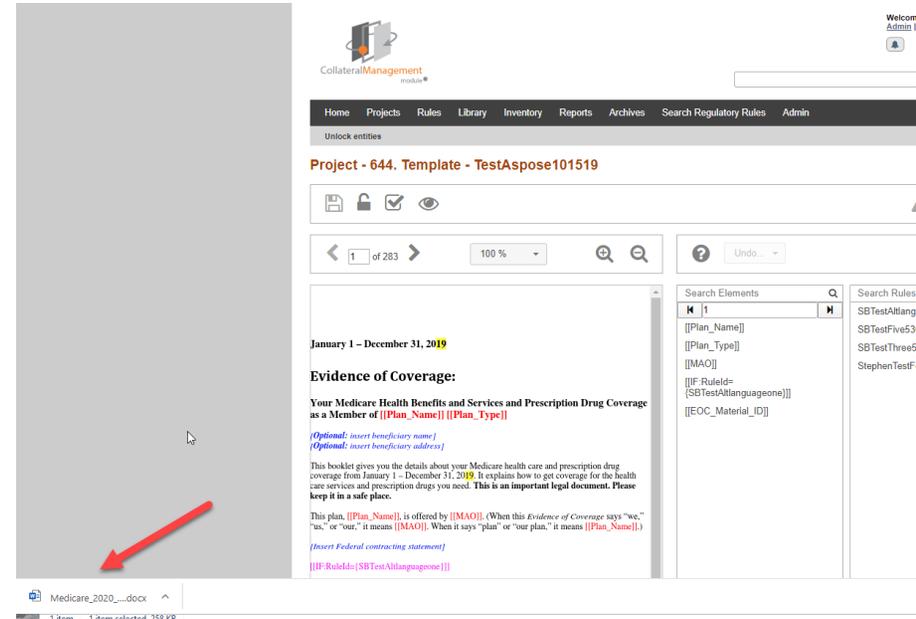


2. From the popup window, choose the plan number for the plan you wish to test.

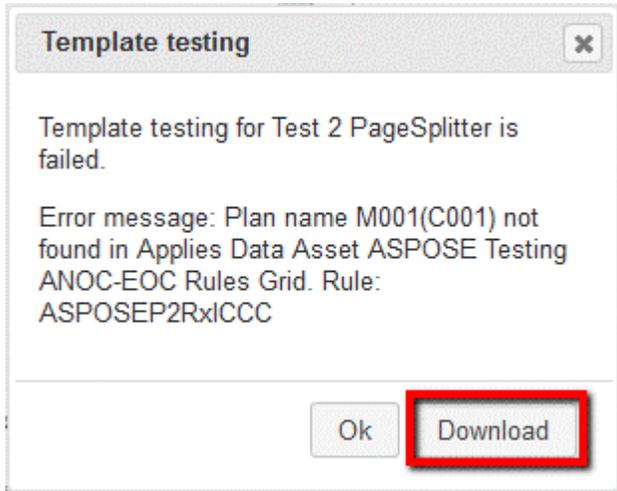
NOTE: When the project is set up in CodySoft®, your project manager selects the plans to which the project applies.

3. Select the type of output you would like, either a Word file or a PDF.
4. Click **OK**. The Template Testing dialog box opens.

5. Click **Preview**. A new browser window opens, and a plan-specific version is displayed as a PDF for your review or opens in MS Word. You can open or download this test the template file.



NOTE: If errors occur when you test a template, an error message displays as in this example:



You can download the error(s) in an Excel .csv file and then edit the template or asset to address the error(s).

NOTE: CodySoft removes blank rows and end of row paragraph marks in all tables in your document as part of the Test the Template process.

CodySoft updates all Tables of Contents in your document with any page number changes and any new, changed, or deleted headers also.

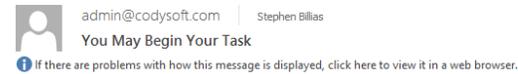
Review Process

As an end user, you can respond to review tasks you are assigned, and you can mark up documents using the Markup Tool during Concurrent review or edit copies of Word documents using Edit File during Routing Review, to indicate where changes are necessary. Reviews take place both on the Template and its draft plan documents, and on the versioned documents after the template has been approved. The top tab of the reviews process is Reviews. Review tasks is a heading on both the Template Reviews and Version Reviews tabs.

Accessing your tasks for review

There are several ways you can access your tasks for review:

From the email you receive when you are assigned a task. Here is a sample email:



Request Details:

Project Name: Stephen B Review Project
Project #: 309

The following task has been assigned to you (see below) and you may begin now.

Task: Template Review Task - Please review HPP MAPD EOC (Markup Tool)
Description: You have been assigned a review task.
Start Date: 2016-07-29
Due Date: 2016-08-02

Link to project: [Project](#)

1. From the email, click the **Project** link.
2. The document opens, ready for editing.

You can also get to your tasks after you log in from the Review tab in the project in which you were assigned a task:

1. Open a Project
2. Click the Review tab. Your tasks for review are listed:

Review Tasks

Tasks - Active Reviews					
Template	Review Round	Name	Start Date	End Date	Edit Method
DocumentAnnotateTool 3-29-17	1	DocumentAnnotateTool	3/28/2017	4/3/2017	Markup Tool <input type="checkbox"/>

Tasks - Completed Reviews

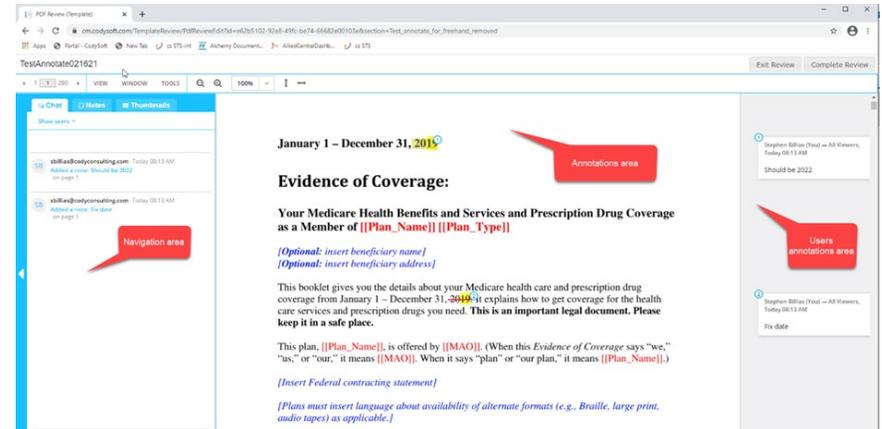
3. In the Edit Method column, click the Markup Tool if a Concurrent review (or click Edit File if a Routing review) to open the file for editing

You can also get to a task after you log in from the Notifications icon at the top right of the main CodySoft® screen.

1. Click the “You May Begin Your Task” message to open the task email
2. Click the Project link to access the document for editing.

Marking up documents with the Markup Tool

The PDF Markup tool is an easy-to-use editor that provides document reviewers with a simple interface to make edits:



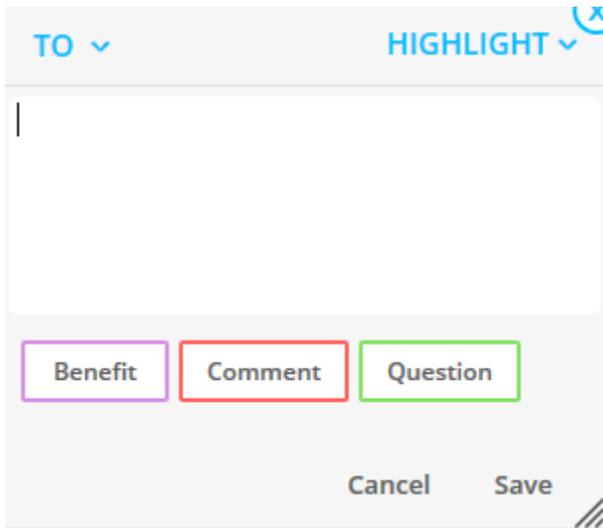
The screen is divided into three main areas:

- **Annotations area** – The center area where you add annotations
- **Users Annotations section** – On the right, where all annotations made to the document are listed.
- **Navigation area** – On the left, available by clicking the arrow to expand it, where you can navigate through the document, filter the annotations, chat with other reviewers, and export your annotations.

Annotations Area

Adding an edit or comment is as easy as clicking in the annotations area.

1. Click, or click and drag to identify a section where you want to make an annotation. As soon as you click, the annotations dialog box displays:



2. Click the HIGHLIGHT dropdown to change the annotation type. The dropdown list displays the choices for annotation type:
 - **Highlight**—marks the text with highlight
 - **Underline**—marks the text as underlined
 - **Insert**—allows you to insert text in the annotation
 - **Strikethrough**—marks the text as strikethrough
 - **Edit**—copies the selected text into the annotation for editing

- **Mark section**—to mark an entire section for annotation.

3. Enter text in the text box that describes the annotation, for example “Check plan types” or “Update contract year.”
4. Click the TO dropdown in the upper left of the dialog box to select whether to make the annotation visible just for yourself or for all users assigned to the review.

Optionally select one of the tags to enable you and other reviewers to narrow the annotations to a subset, for example, Benefits questions. Your system administrator sets up the appropriate tags for your use. Highlight color is based on the tag type:

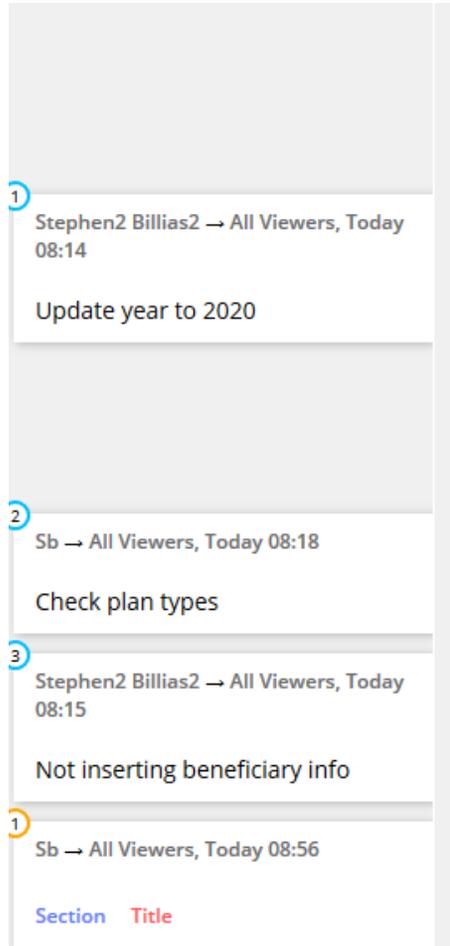
- Benefits in purple
- Comments in red
- Questions in green

5. Click **Save** to save your annotation or click Cancel to cancel your annotation.

The tool uses your last selection of annotation type for the next annotation. You can change the type when you make the next annotation.

Users Annotations Area

The Users Annotations area keeps track of your annotations and those of others:



1 Stephen2 Billias2 → All Viewers, Today 08:14
Update year to 2020

2 Sb → All Viewers, Today 08:18
Check plan types

3 Stephen2 Billias2 → All Viewers, Today 08:15
Not inserting beneficiary info

1 Sb → All Viewers, Today 08:56
Section Title

If more than one person is reviewing the same document, their annotations appear in real time while you are in the review.

You can reply (add a comment) to an existing annotation in the document, and edit an annotation you have made:



3 Stephen2 Billias2 → All Viewers, Today 08:15
Not inserting beneficiary info
Reply Edit Delete

NOTE: You can only delete annotations you have made, not the annotations of others.

Navigation area

Navigation

The Navigation area provides many tools for working in the review:

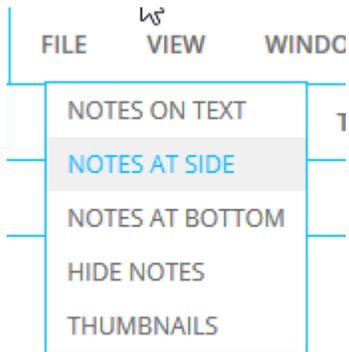


Navigation toolbar showing page navigation (1 of 280), menu items (VIEW, WINDOW, TOOLS), search icons, zoom level (100%), and navigation arrows.

View menu

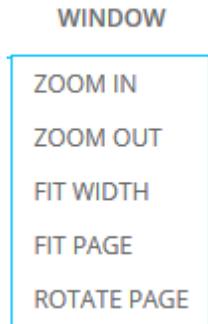
From the View menu you can choose where to show the Notes, or to hide them, and you can also access a view of all pages as thumbnails for navigation

purposes.



Window menu

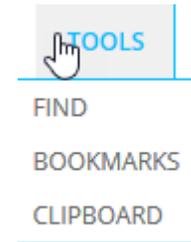
From the Window menu you can change your view of the annotations by zooming in or out or setting the view to fit the width or the page size or rotate the page view.



Tools menu

From the Tools menu you can use the Find functionality to search the

document, locate Word bookmarks, or bring in material from the Clipboard.

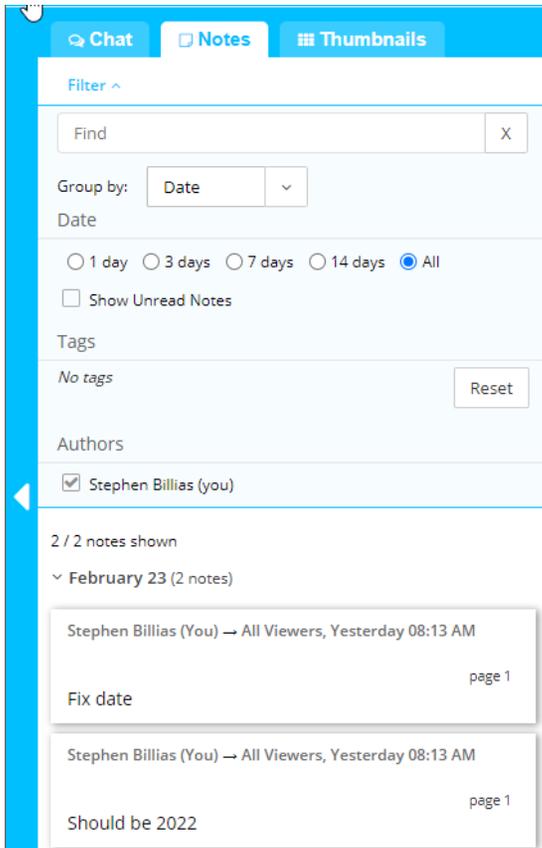


Chat

The Chat choice enables you to chat with other users who are on the review. This feature is useful for real time conversation about a document. Chats are not saved in the Markup tool.

Notes

The Notes choice gives you the opportunity to Filter the list of annotations by date, by tags, and by authors of annotations. You can find notes using a search bar and group the notes by various elements also.

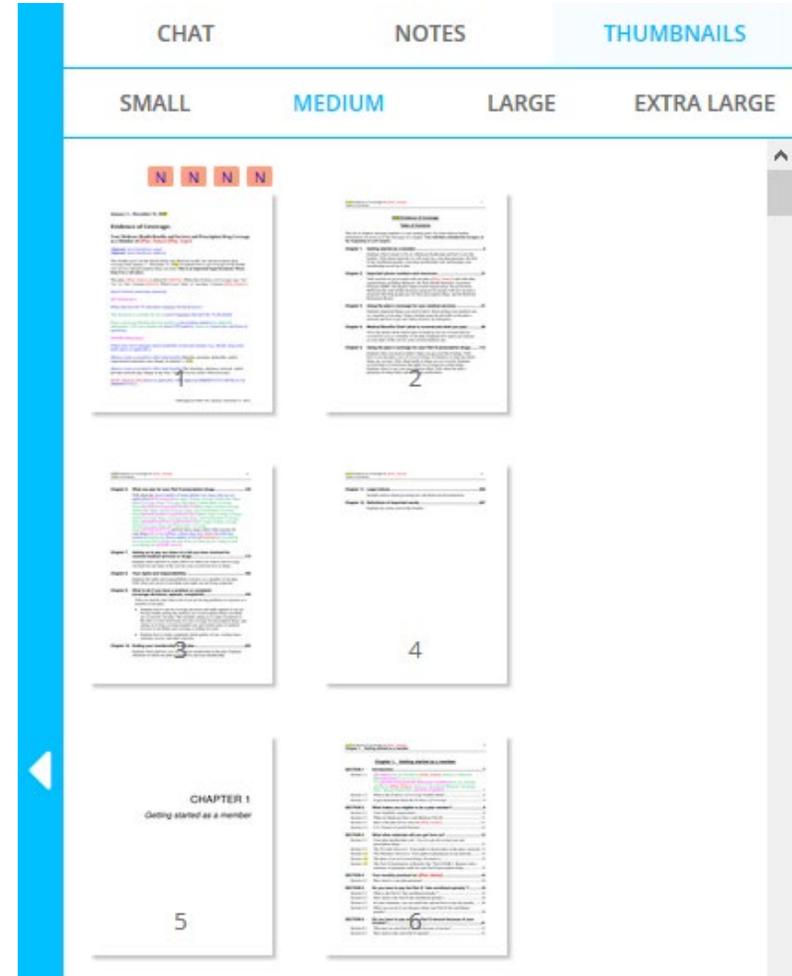


The screenshot shows the 'Notes' filter panel with the following elements:

- Navigation tabs: Chat, Notes (selected), Thumbnails
- Filter dropdown: Filter ^
- Search bar: Find [X]
- Group by: Date
- Date filters: 1 day, 3 days, 7 days, 14 days, All (selected)
- Show Unread Notes:
- Tags: No tags [Reset]
- Authors: Stephen Billias (you) [checked]
- Summary: 2 / 2 notes shown
- Grouped notes for February 23 (2 notes):
 - Stephen Billias (You) → All Viewers, Yesterday 08:13 AM (page 1) - Fix date
 - Stephen Billias (You) → All Viewers, Yesterday 08:13 AM (page 1) - Should be 2022

Thumbnails

The Thumbnails choice allows you to view the pages of the document as thumbnails in a variety of sizes. Click any thumbnail to go to that page.

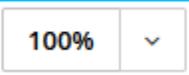


The screenshot shows the 'Thumbnails' view of a document with the following elements:

- Navigation tabs: CHAT, NOTES, THUMBNAILS (selected)
- Thumbnail size options: SMALL, MEDIUM (selected), LARGE, EXTRA LARGE
- Document thumbnails: Six thumbnails numbered 1 through 6, showing various pages of text and a chapter header.
- Navigation: A blue vertical bar on the left and a grey vertical bar on the right with a scroll indicator.

Sizing icons

The review space provides these additional navigation tools:

- The plus or minus looking-glass icons   increase or decrease the display of the annotations area.
- The sizing dropdown  gives you a set of choices for resizing the annotations area
- The vertical double-arrow  positions the entire annotations area vertically as a single page
- The horizontal double-arrow  positions the entire annotations area horizontally as a single page

Complete review

Click **Exit Review** to leave the review without completing it. All changes you have made during the review session are saved automatically. All changes you have made during the review session are saved automatically.

When you have made all annotations and added all comments to other

reviewers' annotations:

1. Click **Complete Review** to end your review. The Confirm Commit Changes dialog box displays:

Confirm Commit Changes ✕

WARNING!

Once changes have been committed, your review task will be marked as complete, and no further changes will be allowed.

Please enter review task time:

h m

2. Enter the time you spent on the review.
3. Click **Commit**.

Your changes are committed to the database and available to the document creator or project manager, and the task is marked as complete automatically.

Click the eye icon  on a completed task to see a PDF of the completed review file with all collated markups or click the .CSV icon  to download a

.CSV file of the comments in Excel format

Review Tasks

Tasks - Active Reviews

Template	Review Round	Name	Start Date	End Date	Edit Method	
SBTemplate50919	1	Review sample EOC	5/9/2019	5/30/2019	 	<input checked="" type="checkbox"/>

When all reviews in a round of review are complete, it moves to the Completed reviews section.

Tasks - Completed Reviews

Template	Review Round	Name	Start Date
TestReviewProcess7518-2	1	TestReviewTemplate2Round1070518	7/5/2018

Review Tasks

Tasks - Active Reviews

There is no data available.

Tasks - Completed Reviews

Template	Review Round	Name	Start Date	End Date
SBTest51517	2	Test annotations in completed review	5/19/2017	5/19/2017

Editing documents in Edit File

If the review is Routing and the Edit Method is Edit File, click Edit File from the Review tasks section on the Reviews tab page. The document opens in whatever format the document was created. This might be a Microsoft Word file, an Excel spreadsheet, a graphic image, or several other formats. If you are working in Microsoft Word, be sure to turn on Track Changes so that other reviews can see your changes.

NOTE: If more than one reviewer is assigned an Edit File review, the file is

locked by the first person who opens it; only one person can edit the file at a time. You'll need to wait until the file is available for editing.

NOTE: You can save your changes in CodySoft® and return to a review later to complete it. When you return to the file, you can add, edit, or delete previous changes.

Completing tasks on the Review tab

When you have made your changes and saved the file, you can mark the task as complete:

1. From the projects list, go to the project for which you just completed the task.
2. In the project, click the Reviews tab
3. From the Reviews tab, locate the task and select the checkbox at the right to mark the task complete.

Review Tasks

Tasks - Active Reviews

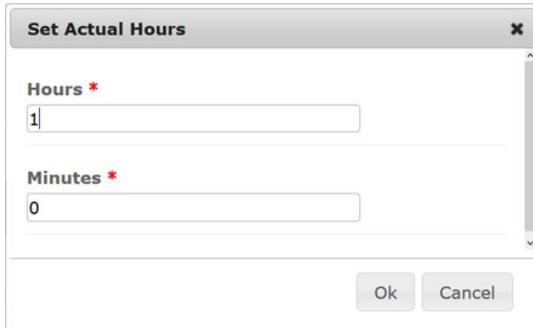
Template	Review Round	Name	Start Date	End Date	Edit Method	
Stephen B Test Review	1	Please review HPP MAPD EOC	7/29/2016	8/2/2016	Markup Tool	<input type="checkbox"/>

4. At the confirmation prompt, click yes to confirm you have completed the task:

Please confirm ✕

Are you SURE you want to complete this task?

- Enter the number of hours and minutes it took you to complete the task:



The dialog box titled "Set Actual Hours" has two input fields: "Hours *" with the value "1" and "Minutes *" with the value "0". There are "Ok" and "Cancel" buttons at the bottom.

- Click **Ok**. A red checkmark indicates you have completed the task.

Review Tasks

Tasks - Active Reviews

Template	Review Round	Name	Start Date	End Date	Edit Method
Stephen B Test Review	1	Please review HPP MAPD EOC	7/29/2016	8/2/2016	

When a review is complete, it moves to the Completed Reviews section. Click the template name in the template to see a PDF of the completed review file with all collated markups.

Review Tasks

Tasks - Active Reviews

There is no data available.

Tasks - Completed Reviews

Template	Review Round	Name	Start Date	End Date
SBTest51517	2	Test annotations in completed review	5/19/2017	5/19/2017

Creating Individual Plan Versions

These are the high-level steps for creating versions. For more information on approving templates and versioning different document types and customizing the version filenames, please see the full *CodySoft Collateral Management User Guide* in the Knowledge Base on the Cody Support portal.

- From the home page of an individual project, select the **Template tab**
- On the Templates tab:
 - Click the **Name** of the template from which you want to make individual plan versions
 - On the template editor screen, click the **Approve or Change Status**  icon
 - In the **Approve or Request Approval** dialog, select **Approved**
 - Click **OK**. The status updates to Approved and you are returned to the project templates screen.
 - Click the **pencil icon**  on a template row to create a version for one or all plans from a template

NOTE: After you have made updates to the template from the reviews of the individual versions, you may need to re-version the individual plans. Follow the steps above.

Completing a Project

Follow these general steps for completing a project:

Creating a Compliance Record

When the plan versions have been reviewed and internally approved, and you

have received CMS approval for the uploaded documents, you can create a Compliance record in CodySoft® to record the successful completion of the project.

1. From the dashboard, select the project that contains the file for which you want to create a Compliance Record
2. On the **Versions** tab:
 - a. Click the **Filename**
 - b. Change status to **Approved**
 - c. Click the **shield icon**  to create a Compliance record
 - d. Select the **Compliance Type** from the drop-down list.
 - e. Select the **Submission Type** from the drop-down list.
 - f. Enter the **Submission Date**.
 - g. Click **OK**.
3. On the **Compliance** tab:
 - a. Enter the **Disposition Date**
 - b. Change the Status to **CMS Approved**
 - c. Click **OK**
4. On the **Versions** tab:
 - a. Click the **Filename**
 - b. From the drop-down list in the Status field, change the Status to **Complete**. The document is published to the Final Version list in the Library as a completed Compliance Record.

Completing the Project

After the all the tasks in your project have been completed, change the project status from In Progress to Complete status to archive the project.

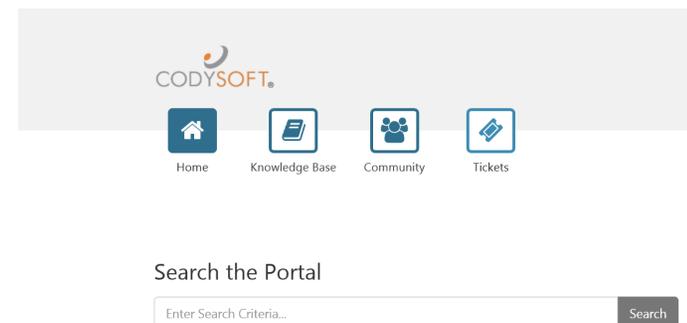
1. From the home page, choose the project you want to complete
2. Change the Status to **Complete**

The project is archived automatically.

Support

In the Support Portal, CodySoft® provides several ways to get more information about how to use the CodySoft® product.

1. From any screen in CodySoft®, click Help in the upper right corner of the screen to enter the Support Portal. The Support Portal home screen displays:



2. From the Support Portal home screen, you have four choices:
 - a. Knowledge Base
 - b. Community

- c. Tickets
- d. Search the Portal

Using the Knowledge Base

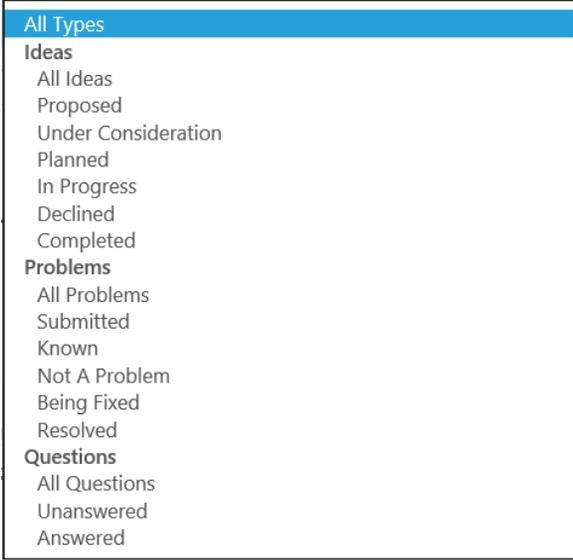
1. Click **Knowledge Base** to enter the Knowledge Base
 - a. Enter a Search term
 - b. Click Search to look for topics related to your search criteria. The system displays a list of relevant Knowledge Base topics.
 - c. The Knowledge Base choice also provides links to these documents for reference:
 - i. CodySoft® User Guide
 - ii. Cody Consulting Group ANOC-EOC data grid template
 - iii. Collateral Management Module® Quick Start Guide
 - iv. How-To Videos

Community

From Community you can search Community threads for discussions of known ideas, problems, or questions.

1. Click Community
2. Enter Search Criteria

3. Filter your search by thread type:



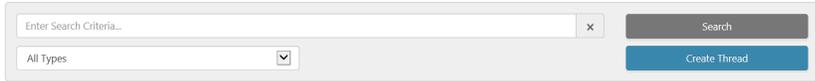
The screenshot shows a dropdown menu with the following options:

- All Types
- Ideas**
 - All Ideas
 - Proposed
 - Under Consideration
 - Planned
 - In Progress
 - Declined
 - Completed
- Problems**
 - All Problems
 - Submitted
 - Known
 - Not A Problem
 - Being Fixed
 - Resolved
- Questions**
 - All Questions
 - Unanswered
 - Answered

4. Click **Search** to search for related threads

You can also start a new Community thread by clicking **Create Thread**:

Community Threads



The screenshot shows a search interface with the following elements:

- Search bar: Enter Search Criteria... (with a clear 'x' button)
- Search button: Search
- Thread type dropdown: All Types (with a dropdown arrow)
- Create Thread button: Create Thread

Open a Ticket

1. Click **Tickets** to enter a new support ticket. The ticket entry screen displays:



The screenshot shows a web form for submitting a ticket. It contains five input fields: 'Contact Name', 'Email', 'Phone', 'Subject', and 'Description'. The 'Description' field is a larger text area. A 'Submit' button is located at the bottom of the form.

- d. **Subject** – Enter a subject name for your ticket that reflects your issue, for example “Login problem”, or “Test the Template issue”.
- e. **Description** – Enter a description of your issue. Give the support person as much detail as you can to help them solve the issue—for example, which project, which plan, which file, any error messages received, and so forth.

Search the Portal

You can search the entire Support Portal:

1. Enter Search Criteria in the Search field
2. Click **Search**

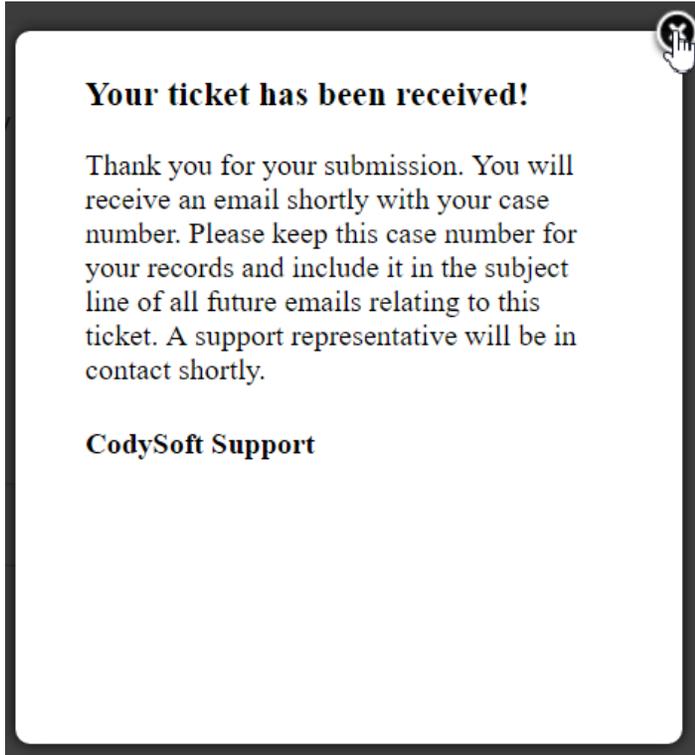
The program returns any matching entries from the Knowledge Base, Community, and Tickets

2. Enter the following information:
 - a. **Contact Name** – Enter your CodySoft® display name. This is your full name.
 - b. **Email** – Enter the email address associated with your CodySoft® account
 - c. **Phone** – Enter a phone number where you can be reached for additional information



CollateralManagement
module®

3. Click **Submit**. A confirmation message displays:



Support email address: support@codysoft.com

Customer Service: 855-990-2639