

# CodySoft May 20<sup>th</sup> 2021 release notes:

## Collateral Management Module:

1. Unlock Entities – added Locked On date for greater visibility to when the entity was locked:

The screenshot shows the CodySoft Collateral Management Module interface. At the top, there is a logo for 'CollateralManagement module' and the 'CODYSOFT.' logo. A user greeting 'Welcome Stephen Billias' is visible with links for 'Admin', 'Help', and 'Logout'. A notification bell icon shows '1114' alerts. A search bar labeled 'Search Projects' is present. Below the navigation bar, the 'Locked Entities' section is highlighted. It contains a table with the following data:

Project Number	Entity Type	Title	Description	User Name	Locked On	Marker
740	Template	Test Preview	Word	Cory Belden	5/19/2021	<input type="checkbox"/>
737	Template	AsposeTest012921	Word	Gaurav Singhal4	5/20/2021	<input type="checkbox"/>
735	Template	Triple S DOCX exte...	Word	Attila Kozma	1/15/2021	<input type="checkbox"/>
723	Template	Copy of Template1	Word	Brian Yavorsky	12/11/2020	<input type="checkbox"/>
723	Template	Template1	Word	Cory Belden	12/2/2020	<input type="checkbox"/>

Below the table, there are navigation icons and the text 'Showing page 1 of 4'. A maintenance notice is displayed: 'We will be performing maintenance on the CodySoft servers every morning at 4 AM ET. On Sundays this maintenance will occur at 1 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.'

At the bottom, there is a footer with navigation links: 'Home Projects Rules Library Inventory Reports Admin Help'. Below the footer, a copyright notice reads: 'This document contains confidential information that is for the proprietary use by Cody Consulting only and cannot be reproduced or used without the sole permission of Cody Consulting. © 2021 Cody Consulting Group, Inc.'

2. Added Hyperlink to the Unassigned Elements page numbers on the Template Editor screen

The screenshot shows a dialog box titled 'Unassigned Elements'. It contains a table with the following data:

Element	Page
[[Plan_Name]]	<u>1</u>
[[Plan_Type]]	<u>1</u>
[[MAO]]	<u>1</u>
[[EOC_Material_ID]]	<u>1</u>
[[Plan_Name]]	<u>2</u>
[[IF:Rx4stages]]	<u>3</u>
[[IF:RxDICCC]]	<u>3</u>
[[IF:RxICCGCC]]	<u>3</u>
[[IF:RxICCC]]	<u>3</u>
[[IF:rxtiers]]	<u>3</u>
[[Formulary]]	<u>3</u>
[[Plan_Name]]	<u>4</u>
[[IF:HMO]]	<u>6</u>

An 'Ok' button is located at the bottom right of the dialog box.

3. Update default column widths to accommodate longer names on Assets screen:

CollateralManagement module

CODYSOFT

Welcome Stephen Billias  
Admin | Help | Logoff

1114

Search Projects

Home Projects Rules Library Inventory Reports Archives Search Regulatory Rules Admin

Assets Final Versions Document Kits Create Kit Search Legacy Create Legacy

**Assets** Create Asset

▼ Active Assets

Name	Category	Type	Status	Created By	Created On	Last Modified	Date Modified				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<a href="#">400RulesGrid</a>	Data	Excel Data...	Draft	Attila Koz...	05/11/2020	Saurabh S...	05/13/2021	✓			
<a href="#">SBDDataGrid2020</a>	Data	Excel Data...	Approval P	Stephen B...	02/18/2020	Saurabh S...	05/13/2021				
<a href="#">10-18 Demo Benefit Grid</a>	Data	Excel Data...	Draft	Al Valenti	10/17/2016	Saurabh S...	05/13/2021	✓			
<a href="#">Attila's Rule Grid</a>	Data	Excel Data...	Draft	Attila Koz...	01/13/2021	Attila Koz...	04/29/2021	✓			
<a href="#">Corys Sample Rules Grid</a>	Data	Excel Data...	Approval P	Cory Belden	08/07/2020	Cory Belden	03/12/2021				
ContentEditor	Content	CodvSoft ...	Draft	Brian Yavo...	06/17/2019	Gaurav Si...	02/12/2021				

4. Update default column widths to accommodate longer Plan Names on Global Dashboard:

Admin

Edit Line of Business Departments Media Types Audiences Cost Centers Plan Types

**Add LOB** Cancel Save

Name

LOB Plans:

Add Plan

#	Plan #	Name	Contract #	MCE #	Plan Types	Sub Plan Types		
1	MDCR001	Medicare - South Florida	H1234	MCE1234	MA	HMO	Edit	Remove

## HPMS Memo Module:

1. Add Select All/Deselect All, and Search function to Disseminations/Acknowledgments.

Please select the dissemination recipients:

Select all / Deselect all

- Adrienne Olson
- Al Valenti
- Alphonse Valenti
- Andrew Casey
- Annie O'Reilly

## Policy and Procedure Module:

1. Add Select All/Deselect All, and Search function to Disseminations/Acknowledgments.

Please select the dissemination recipients:

Select all / Deselect all

- Adrienne Olson
- Al Valenti
- Alphonse Valenti
- Andrew Casey
- Annie O'Reilly

- a. Note: this same functionality applies to Multiple Disseminations as well:

### Multiple Dissemination

Title	Description	Document Number	Version Number
Continued Testing 12/19	Continued Testing 12/19	34567	1
Continued testing 12/30	Continued testing 12/30	99999	1

Select Internal Users   Upload External User List   Add External Users Manually

Select all / Deselect all

Close   Cancel Dissemination   Start Dissemination