CODYSOFT®

Plan Benefit Package
module®

User Guide

For use with application release December 9th, 2021

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Overview

CodySoft®'s PBP (Plan Benefit Package) Module® is a multi-faceted tool for bringing in data directly from a plan's Health Plan Management System (HPMS) bid filing, processing that data, and providing opportunities for data transformation, and exporting the revised data in various formats for the plan's use. This guide provides you with step-by-step instructions for common module activities. If you have questions, please contact your CodySoft® administrator.

Accessibility

After you are added as a user in the PBP Module®, a temporary password is emailed to you for your initial login to the system.

Logging in for the first time:

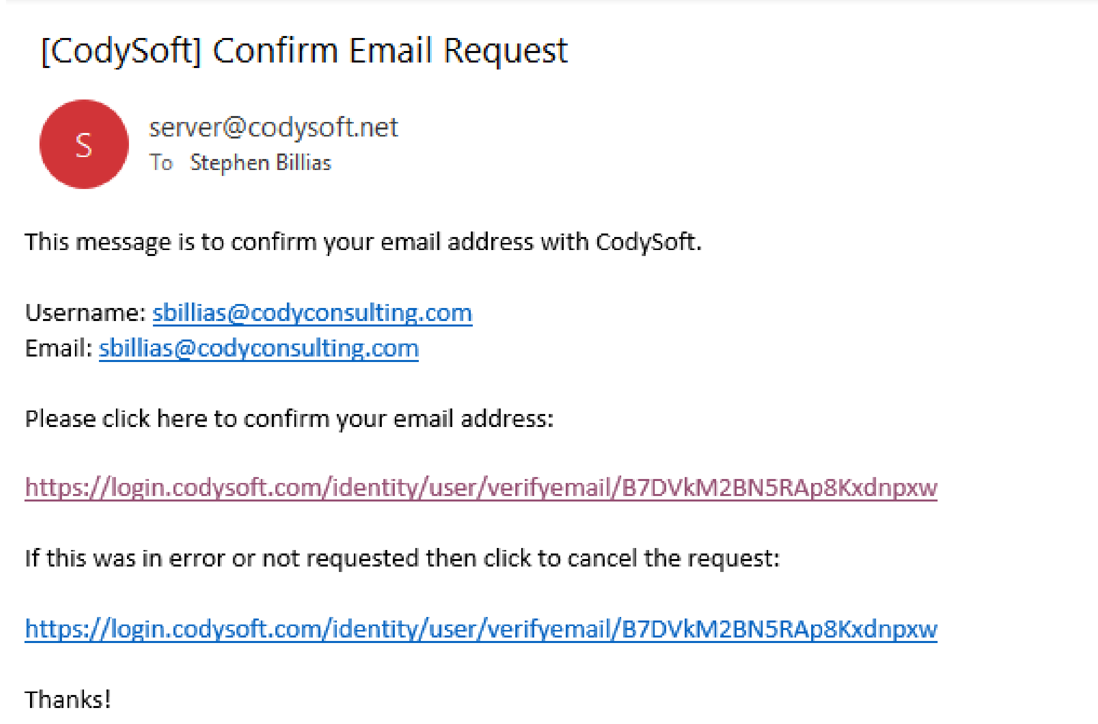
CodySoft® sends you a confirmation email when you are first added to the list of registered users at the start of a project.

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 **username** and **password**
6. Click **Login**
7. Click **Launch csPBP** to begin working in that module

Changing your password (existing users)

1. Click your **Username** on the upper right side of the screen. The **Edit Profile** screen appears.

2. Click **Reset Password** to change your password. An email is sent to the email address you use for your Cody account.
3. From the email you receive, click the link to confirm your email address:



[CodySoft] Confirm Email Request

S server@codysoft.net
To Stephen Billias

This message is to confirm your email address with CodySoft.

Username: sbillias@codyconsulting.com
Email: sbillias@codyconsulting.com

Please click here to confirm your email address:

https://login.codysoft.com/identity/user/verifyemail/B7DVkM2BN5RAp8Kxdnpxw

If this was in error or not requested then click to cancel the request:

https://login.codysoft.com/identity/user/verifyemail/B7DVkM2BN5RAp8Kxdnpxw

Thanks!

4. In the New Password field, enter a **new password**
5. In the Confirm New Password field, enter the **new password** again
6. Click **Submit.** The login screen displays.
7. Enter your **username** and **password**
8. Click **Login**
9. Click **Launch csPBP** to begin working in that module

PBP Module Functionality

The PBP Module has four areas of functionality:

- **PBP Import**—Brings in plan benefit data from plan's HPMS bid filing as XML files by PBP. In this module plans can be added, edited, replaced, and removed. See *PBP Import*.
- **PBP Export**—Outputs transformed data to a variety of formats:
    - **PDF: PBP Report**—a PDF in the order and format of the PBP Report
    - **XLS: PBP Report**—an Excel file in the order and format of the PBP Report
    - **PDF: Datagrid**—a PDF in the order and format of a datagrid
    - **XLS: Datagrid**— an Excel file in the order and format of a datagrid
    - **Publish to CM as Asset**—sends the output to CodySoft's Collateral Management module as an automatically uploaded datagrid for use as an asset

  In PBP Export, before exporting you can define your export by Plan ID and edit the data by adding or removing fields to the export. See *PBP Export*

- **Manage PBPs**—Where you can make changes to the data in PBPs you've imported or remove PBPs from the list. See *Manage PBPs*.
- **Admin**—Uses these setup and definition tools to manage the structuring of the data:
    - Data Schema
        - PBP Schema
        - Companion Data Schema
    - Field Archive
    - Custom Field Names
    - Rule Extensions

PBP Workflow Overview

The workflow for the PBP Module is driven by the Medicare contract year schedule. Each year in the spring health plans file bids in the government's HPMS software. By early June plans receive preliminary approval and download report files containing plan benefit data in a variety of formats. CodySoft's PBP Module uses the XML of these reports as the basis for creating a source of truth for plans to use in building their Annual Notice of Change (ANOC), Evidence of Coverage (EOC), and other documents.

The workflow consists of three major components:

Inputs:

- PBP XML Reports from the bid filing
- Data in XLS format that is not part of the bid but is information needed to complete the documents. A good example of this companion data are the plan premiums

PBP Module Data Processing

- Upload a PBP Schema file for each plan type. The schema are templates that tell CodySoft what variable elements to transform or pass through untouched
- Create rules that auto-transform data when the XML bid reports are imported. These rules are specific to Contract, Plan ID, and element
- Import bid data and associated companion data
- Edit the imported and transformed bid reports and save them.

- Upload Companion Data schema files with information not in the bid reports, such as Premiums.

Outputs:

- Output the data in a variety of formats for use by the plan in creating documents. These output include the ability to export a file to CodySoft's Collateral Management (CM) module as an asset.

In August of each year, the health plans receive final approval of their bids after actuarial and CMS review. Typically these changes are difference in copayment and coinsurance amount for benefits. The final step in the process is to resolve the differences between the transformed data from the June XML bid reports and the new XML files in August. The final output files are used to update the ANOCs, EOCs, and other documents that use the XML data.

Steps in the PBP Workflow

Follow these high-level workflow steps in order in the PBP Module to complete the work of creating a source of truth for your plans' benefits:

1) Add Schemas

First, you need to provide the PBP Module with the specifics for your set of plans. Upload PBP schemas, with one example schema for each plan type in your plan set. You need to take this step only once, at the beginning of each plan year. A good time to do this is when CMS releases its beta software at the beginning of the contract year. That beta software identifies what benefits have been added, deleted, or split into multiple benefits. After you update your plan information, upload the PBP schemas for your various plan types. See *Data Schema*.

Also add Companion Data schema files. These are Excel .XLSX files properly formatted for input into the PBP Module. See *Upload a new Companion schema*

2) Develop Transformation Rules

Next, create new rules or edit existing transformation rules to account for changes to benefits. For example, you may use different names for your benefits than those used by CMS and need to write rules to automatically change the benefit names. This work of creating or editing rules may be ongoing throughout plan year.

NOTE: Rule changes go into effect (the rules are applied) when you import PBPs. If you add or change a rule after import, it will not affect the imported plan. See *Custom Field Names.*

3) Import PBPs

After you upload schemas and create rules for your benefits, you are ready to import your PBPs. The import process consists of two main phases:

- **The testing phase.** Import one or many PBPs. Check to see how your custom fields have been applied to the data and add new rules or edit the existing rules you have created if necessary. You can delete any In-Progress import and reimport the PBP.xml files if needed. Whatever changes you have made to the custom fields will be applied to the new import. This may be an iterative process of importing, testing your fields, and deleting and re-importing, as necessary.

  Certain activities during the plan year may require you to add rules or edit them. For example, you may need to edit rules because of changes to benefits during the rebid/reallocation phase of the process. Changes resulting from new information in memos from CMS may cause you to re-write rules also.

- **The committal phase.** When you are satisfied with the import, you confirm and commit the plans to the data base. You can then further edit the information in the plans using Manage PBPs. See *PBP Import.*

4) Manage PBPs

When your plans are imported you can further edit your rules to handle individual exceptions and then reprocess selected plans to re-run the rules against them, or you can choose to upload a committed plan as a full replacement, to apply the rules again.

It may be judgment call to decide whether there were enough changes to warrant a re-upload of a replacement plan. For example, if you have only a few changes, you may just want to revise rules edit the plan benefit data in Manage PBPs, and then reprocess selected plans. However, if you have many changes that require you to create or edit multiple rules, then it may be worthwhile to upload a replacement file.

Also, if you know that changes will need to be applied to next year's import, you may want to edit rules even if you don't re-import plans. See *Manage PBPs*.

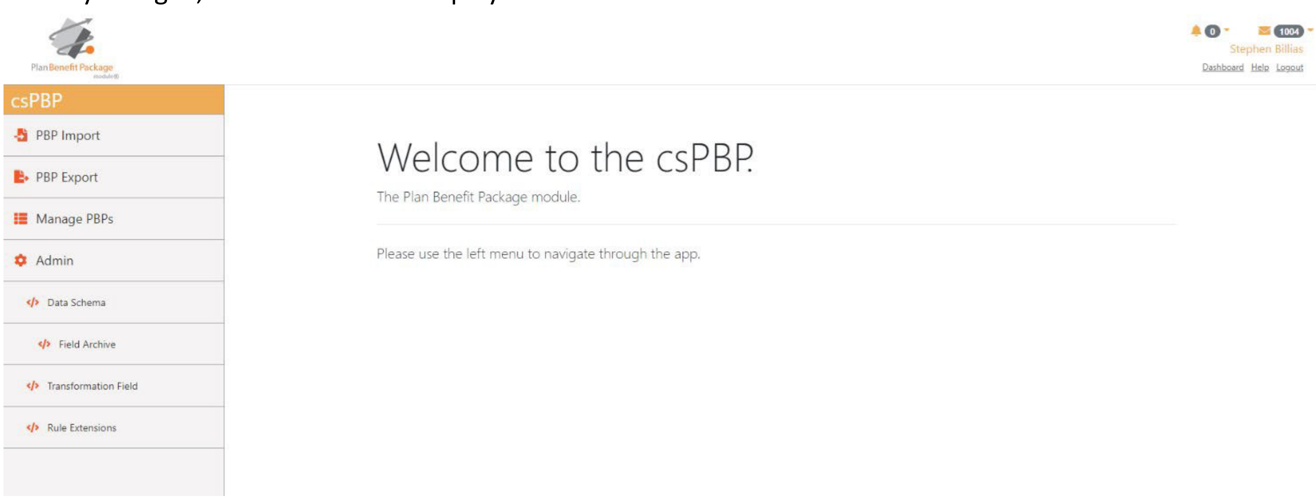
Export PBPs

The final step of the PBP process is to select plans and benefits for export, as files you either download for use within your organization, or export directly into CodySoft's Collateral Management (CM) module for use as assets in creating ANOCs, EOCs, or SBs. Check with your system administrator if you're not sure whether your organization is using the CM module.

See *PBP Export*.

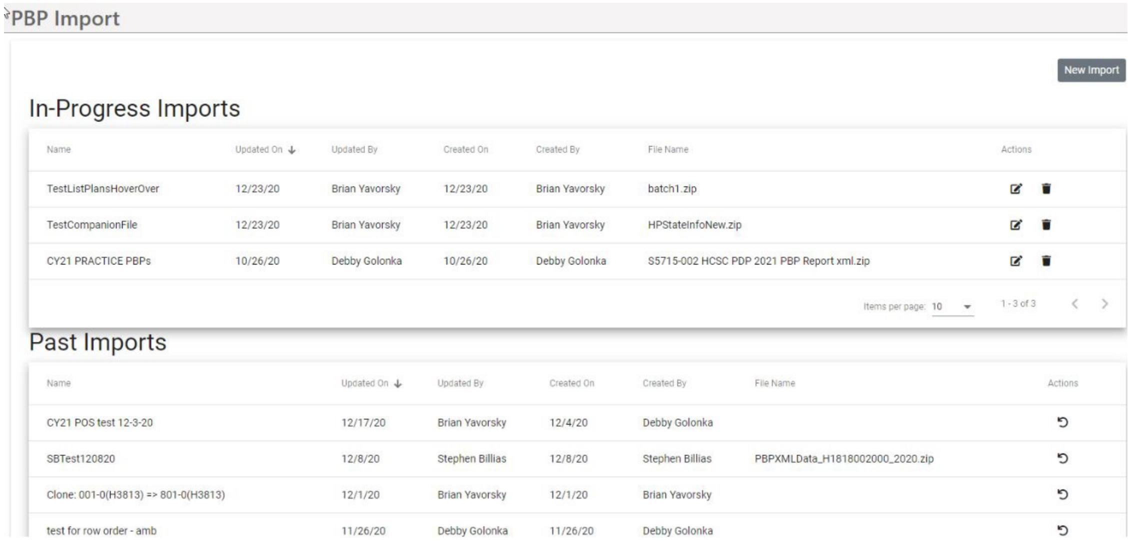
PBP Import

When you log in, the home screen displays:



The PBP Import screens allow you to bring in plan benefit data from the plan's HPMS bid filing.

1. Select **PBP Import**



PBP Import

New Import

In-Progress Imports

Name	Updated On	Updated By	Created On	Created By	File Name	Actions
TestListPlansHoverOver	12/23/20	Brian Yavorsky	12/23/20	Brian Yavorsky	batch1.zip	
TestCompanionFile	12/23/20	Brian Yavorsky	12/23/20	Brian Yavorsky	HPStateInfoNew.zip	
CY21 PRACTICE PBPs	10/26/20	Debby Golonka	10/26/20	Debby Golonka	S5715-002 HCSC PDP 2021 PBP Report xml.zip	

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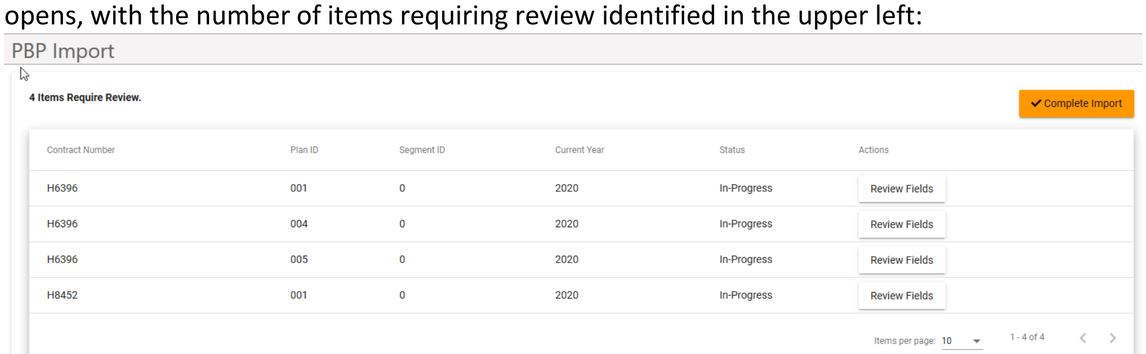
Past Imports

Name	Updated On	Updated By	Created On	Created By	File Name	Actions
CY21 POS test 12-3-20	12/17/20	Brian Yavorsky	12/4/20	Debby Golonka		
SBTest120820	12/8/20	Stephen Billias	12/8/20	Stephen Billias	PBPXMLData_H1818002000_2020.zip	
Clone: 001-0(H3813) => 801-0(H3813)	12/1/20	Brian Yavorsky	12/1/20	Brian Yavorsky		
test for row order - amb	11/26/20	Debby Golonka	11/26/20	Debby Golonka		

Files you have imported are listed on the main screen in two categories:

- **In-Progress Imports**—Lists all PBPs that you are still reviewing and have not yet finalized. You can use in-Progress imports as a staging area to test your imports without committing them to the database and delete any In-Progress imports that you don't want to finalize and add to the list of imported items.
    1. Click the edit icon on any In-Progress Import to resume the import. The Import opens, with the number of items requiring review identified in the upper left:



PBP Import

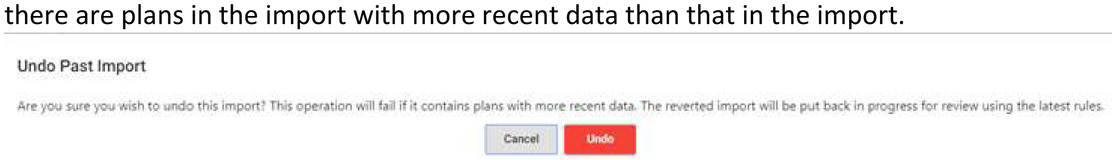
4 Items Require Review.

Complete Import

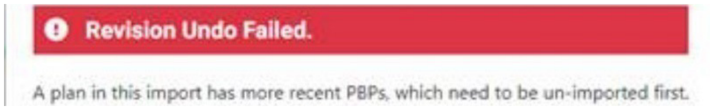
Contract Number	Plan ID	Segment ID	Current Year	Status	Actions
H6396	001	0	2020	In-Progress	Review Fields
H6396	004	0	2020	In-Progress	Review Fields
H6396	005	0	2020	In-Progress	Review Fields
H8452	001	0	2020	In-Progress	Review Fields

Items per page: 10 1 - 4 of 4

    2. Click the trash can icon to delete an in-progress import
- **Past Import**s—Lists all previously imported PBPs, both those that have been imported without transformation and those have already been transformed and reviewed during the import process, and committed to the database, where they are available in the Manage PBPs section of the application.
    1. Click the undo icon to undo a past import. The import is moved back to the in-progress list and uses the latest rules to process it. A warning message displays to confirm that you want to undo the past import and warns that the Undo will fail if there are plans in the import with more recent data than that in the import.



2. Click **Undo** to continue with the undoing of the past import.
   NOTE: If the Undo fails, an error message displays:



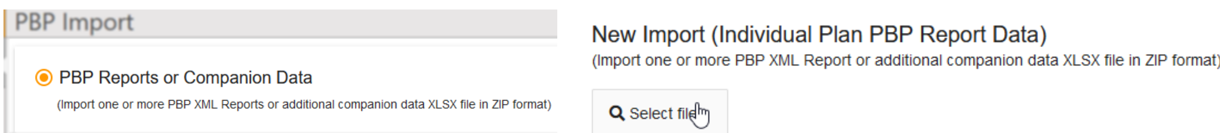
3. Click **Close** to return to the Import screen.

NOTE: If you hover your cursor over any line in either In-Progress or Past Imports, you can see the list of plans contained in the import without having to open it:

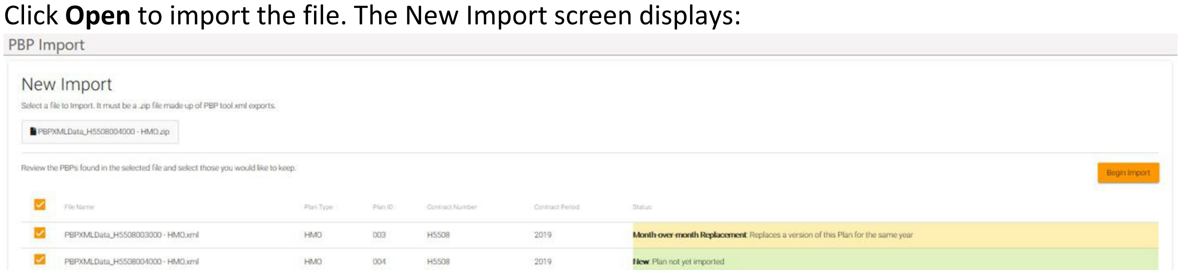
New Import

1. Click **New Import** to import another PBP plan or group of plans:

2. Select the **PBP Reports or Companion Data** option followed by **Next**. Click the **Select file** button to locate and upload your one or more **XML or XLSX** file(s) in ZIP format.

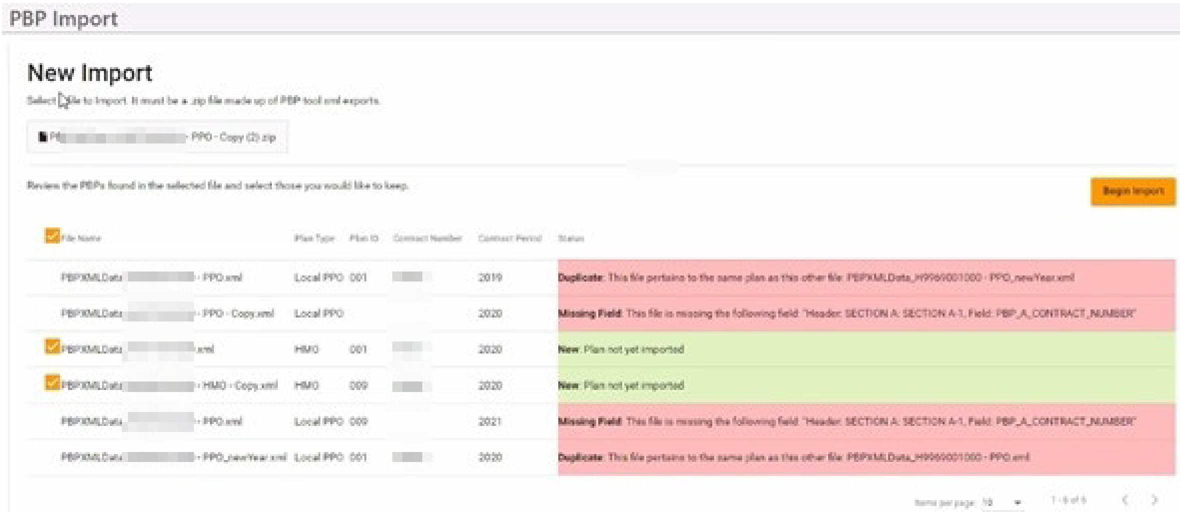


3. Click **Open** to import the file. The New Import screen displays:

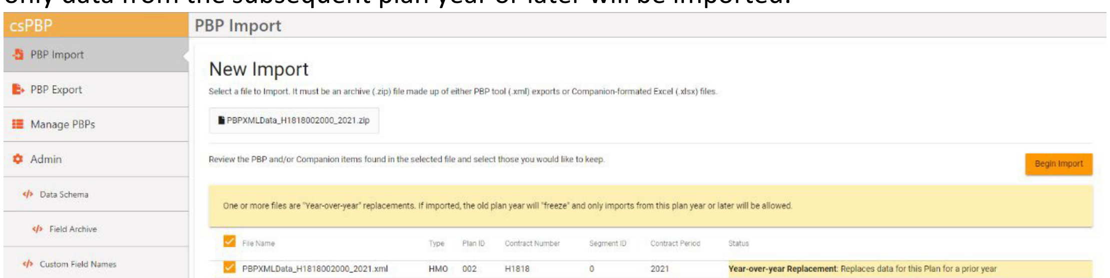


NOTE that the color coding and text on each row differentiates between new plans and replacement plans. See *Replace Plan* also.

Additionally, the New Import screen identifies plans that are duplicates, or incomplete, for example, if a field is missing, and does not import them (no checkmark next to the plan name):

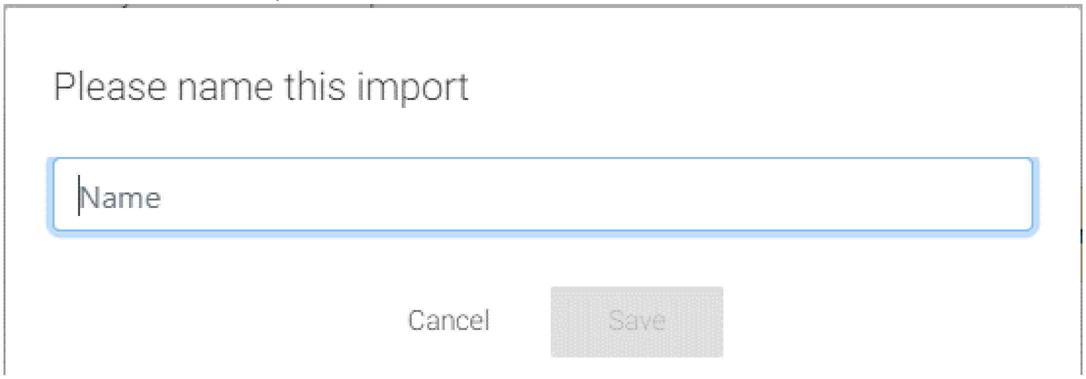


Also, the New Import screen identifies previous year's plans that are no longer available for editing; the data is locked and cannot be imported again. A warning message indicates that only data from the subsequent plan year or later will be imported:

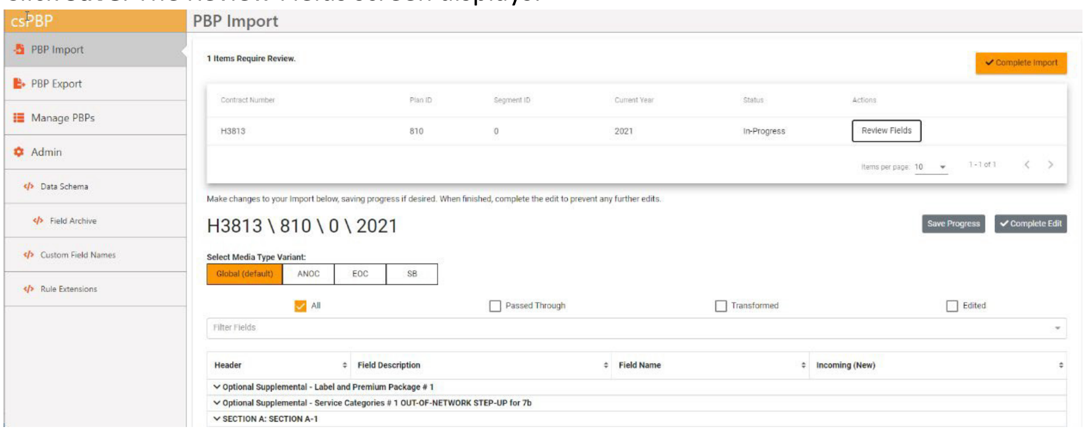


4. Either select another file by clicking the imported filename or click **Begin Import**.
5. Name your import according to your company's naming conventions. You can use filenames to identify the context for the import. If this is a replacement for a previous import you could include that word in the filename, for example: "ReplacementPPO." If this

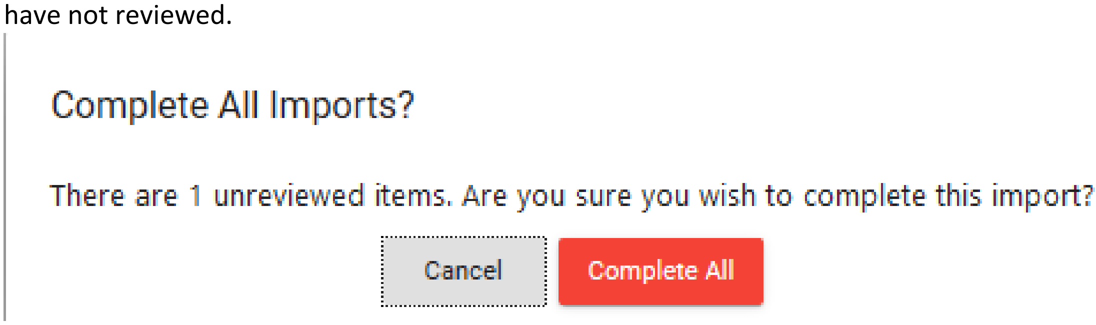
is an early draft based on the initial bid filing in June, you could include that information in the filename, for example: "FirstJuneBidHMO."



6. Click **Save**. The Review Fields screen displays:

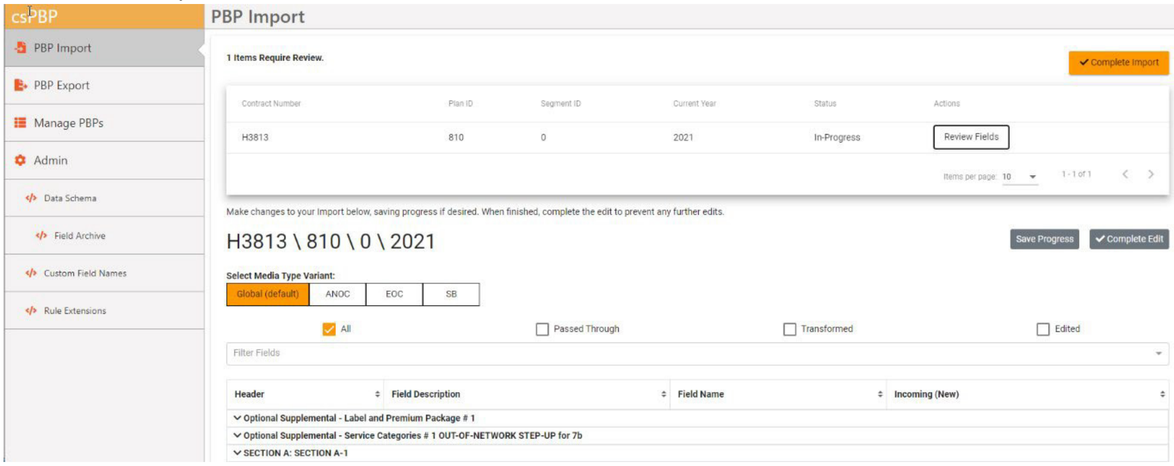


NOTE: You can click **Complete Import** at any time, even if you have not reviewed the fields for the import. If you choose to do this, a warning displays, listing the number of items you have not reviewed.



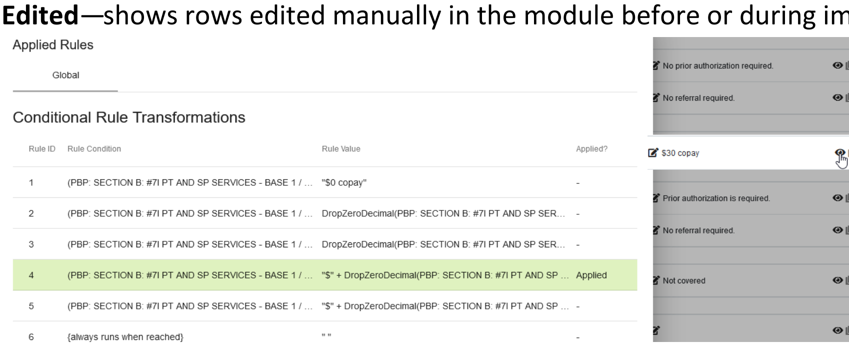
a. Click **Complete All**, to continue and complete the import.
b. Click **Cancel** to continue with the Review Fields process.

7. Click **Review Fields.** The fields display, with the plan you are reviewing identified as a header for easy reference:

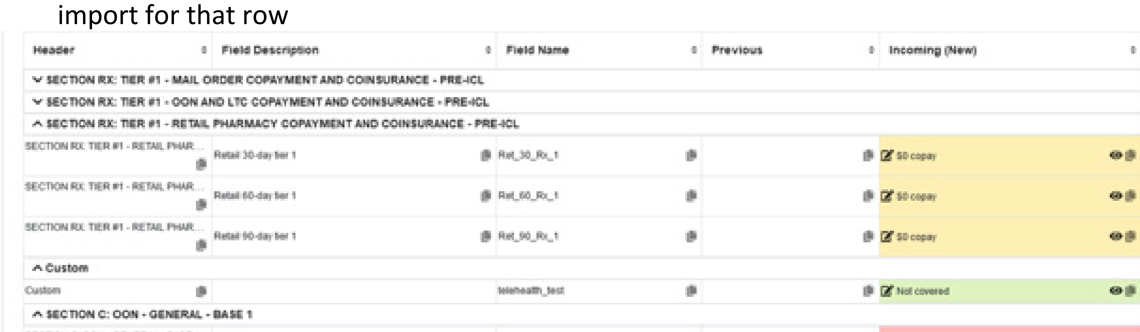


NOTE: You can use Filter Fields to filter for Custom Fields or Not Custom fields or filter on headers, field names or descriptions to filter the In Progress import screen. See *Filter Fields*.

8. Select a specific **Media Type Variant** to import only those fields that have a Media Type Variant rule transformation set up. The default is Global (all media type variants.)
   NOTE: If there are no media type variant rule transformations set up for this plan, this choice does not display.
9. Select the appropriate checkbox to see how the field values are generated:
   - **All**—shows all data
   - **Changed**—shows only changed data
   - **Passed through**—shows PBP XML data imported directly without editing. This is the default behavior if there are no rules associated with the field. Many passed through fields may not be part of the final export. You can decide which fields are chosen for export or omitted during the Export process. See *PBP Export*.
   - **Transformed**—shows rows transformed by rules during the import process. Clicking the 👁 icon at end of the line displays which rule is applied.
   - **Edited**—shows rows edited manually in the module before or during import.

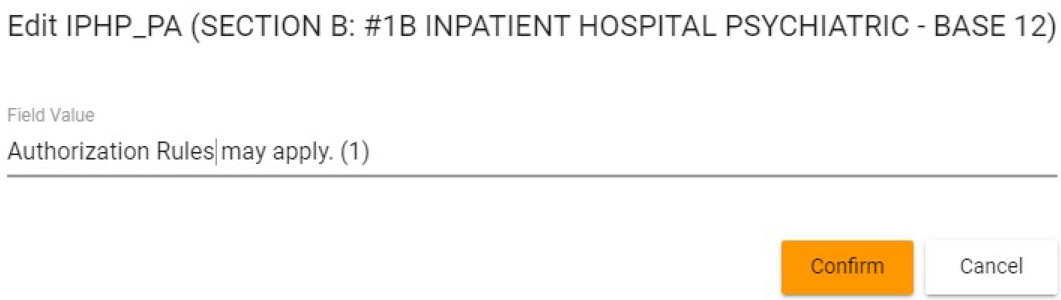


10. Click the **down arrow** ⌄ at the beginning of section header to expand details on the import for that row



In the Incoming (New) column, **new** values are highlighted in green, **changed** values in yellow, and deleted fields in red. You can change the value on any item. For deleted items, even if a benefit has been deleted from the PBP, a plan may still offer the benefit and wantto make edits to it.

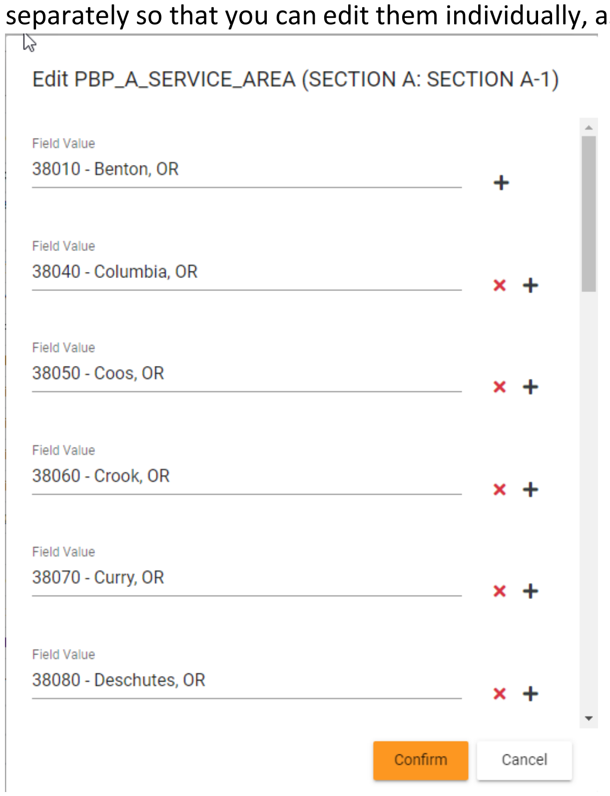
a. Click the edit icon on a new (green), changed (yellow), or deleted (red) row
b. Enter a new **value**.



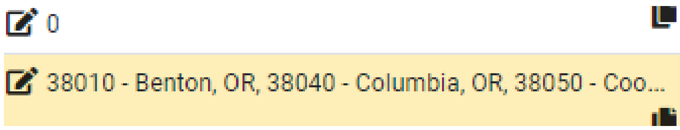
c. Click **Confirm**. The value is updated in the Incoming (New) column.

NOTE: Edits here should be considered an exception for special cases. Check to see if it would be better to create a rule to handle changes to values. See *Custom Field Names.*

11. Optionally, if you are editing a field that contains a list, the list items are displayed separately so that you can edit them individually, as in this example for Service Area:

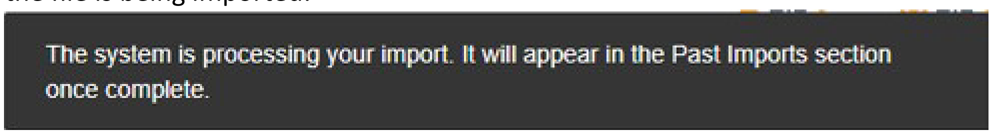


a. Click in the field to edit a field value
b. Click the red X to remove a field value.
c. Click the black **+** to add a field value.
d. When you have made edit and added or removed field values, click **Confirm** to apply your changes. Fields you edited are highlighted in yellow for easy identification:

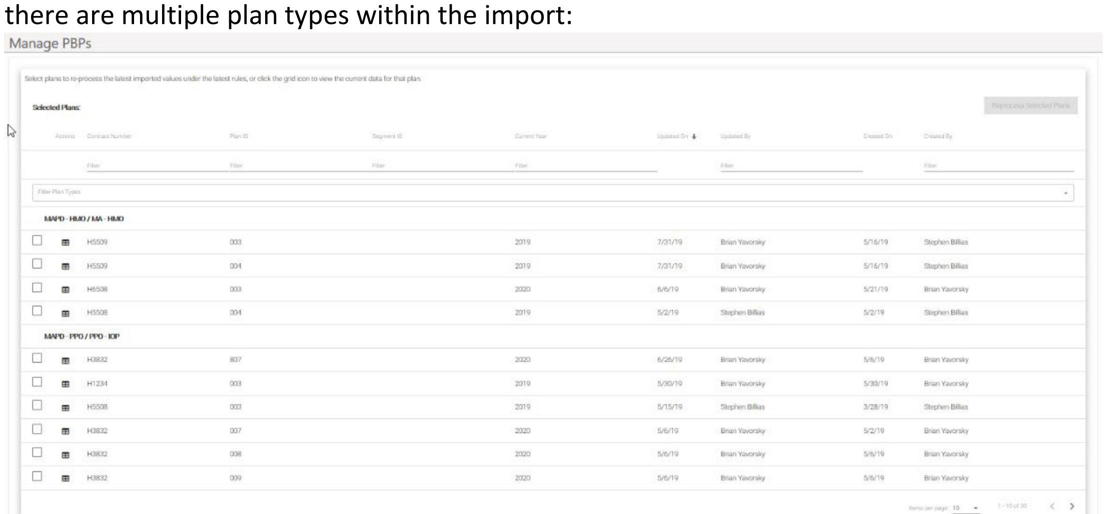


e.

12. Click **Save Progress** to save all changes you have made using “Use My Value” without completing the import.
13. Click **Complete Edit** to continue the import process.
14. Repeat the import process for all plans in this import file.
15. When the status for all plans is Complete, click **Complete Import**. A message displays while the file is being imported:

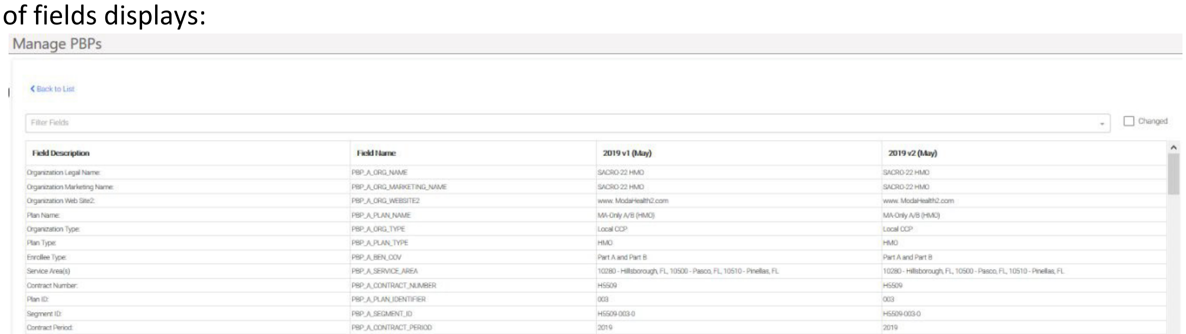


16. When the import is complete, refresh the screen to view the updated list.
17. Click **Manage PBPs**. The Manage PBPs screen displays, with plans grouped by plan type if there are multiple plan types within the import:



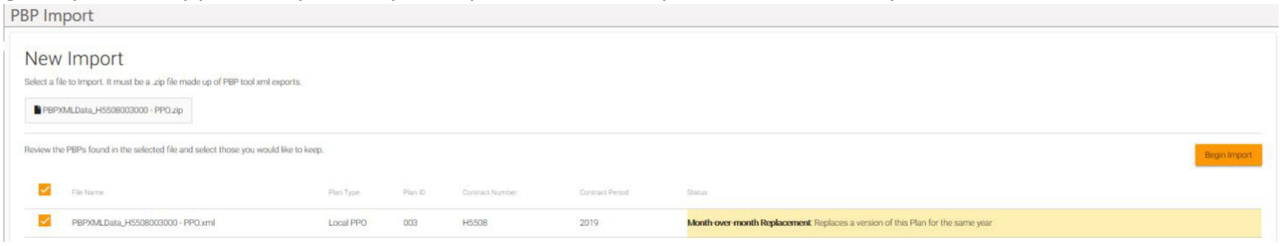
NOTE: You can filter on any of the columns in the list, and you can filter by plan type also.

18. Click the list icon to view the list of individual rows in the plan list of benefit data. The list of fields displays:



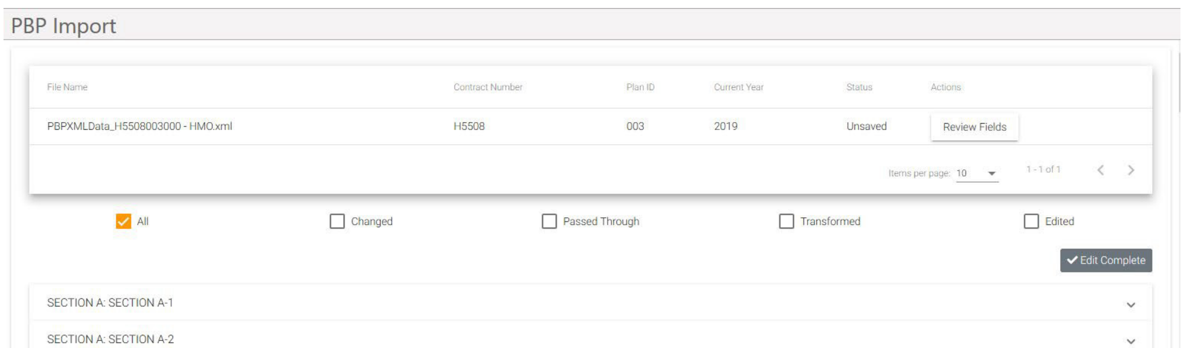
Replace Plan

1. To replace a current plan's data with new plan data, click **New Import.**
   NOTE: The current data file is not deleted. It remains in the list of imports.
2. Select the replacement file. The PBP Module identifies the import as a replacement file and gives you the opportunity to keep or replace individual plans within the import file:



3. Select the checkboxes for the plans you want to keep
4. Click **Begin Import**
5. **Name** the file
6. Click **Save**

NOTE that in additional to the previous filtering checkboxes New Import, (All, Passed Through, Transformed, and Edited) there is an additional checkbox, Changed, because this is a replacement:



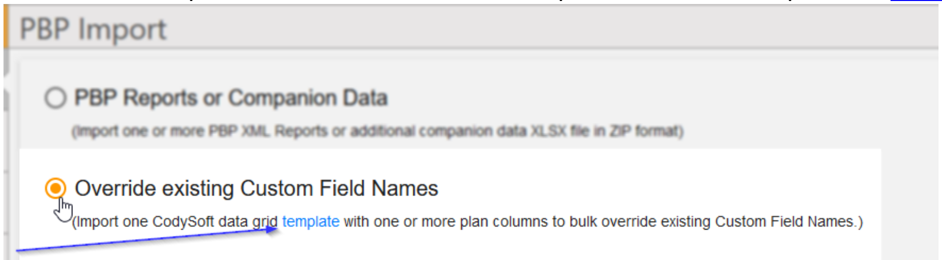
When the replaced plan displays in Add Item, the row changes are color coded as follows:

- Red indicates a field was in the original but is now missing or deleted in the new replacement.
- Green is a new field in the new replacement plan that was not in the original.
- Yellow indicates a change. This change might be the result of several different actions:
  - The value changed from the original value to the value in the new replaced plan. The original value in PBP report may have changed.
  - The transformed value is different from the previously transformed value. An XML script or rule may have changed.
- Unchanged rows have no color coding

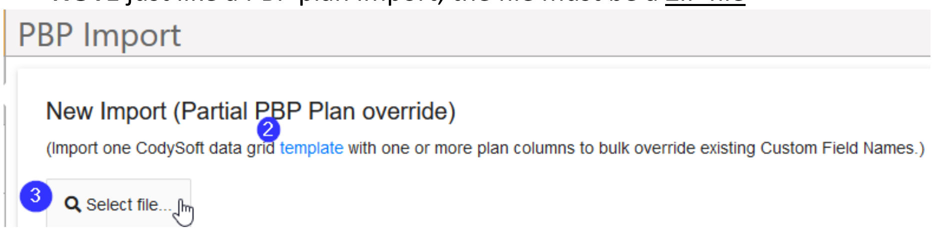
3. Click **Save** after making any manual edits to complete the replacement.

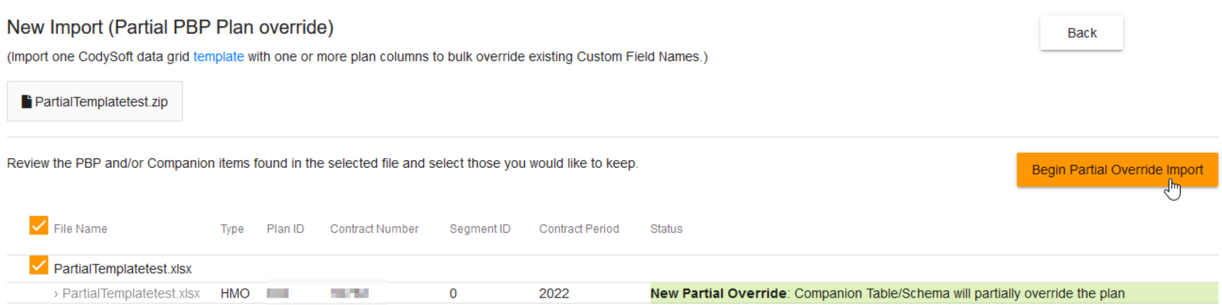
Override existing Custom Field Names

1. Select this option to replace any existing custom fields in a plan matching the identical header, description and field names of those provided from an uploaded template.



2. Download the partial override template and follow the enclosed instructions to populate your data.
3. Click the **Select file** button to upload your partial override template the same as a new import.
   - **NOTE** just like a PBP plan import, the file must be a ZIP file

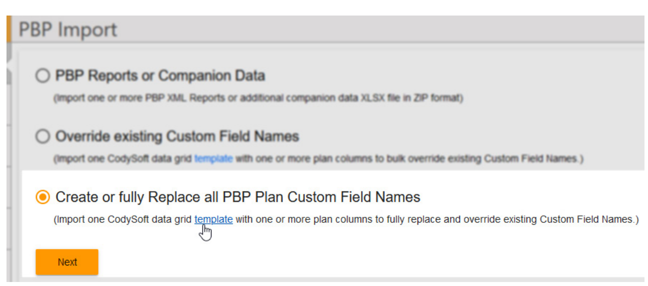




4. When processed successfully, the screen will confirm and clicking the **Begin Partial Override Import** will be processed the same way as a New PBP Import.

Create or fully Replace all PBP Plan Custom Field Names

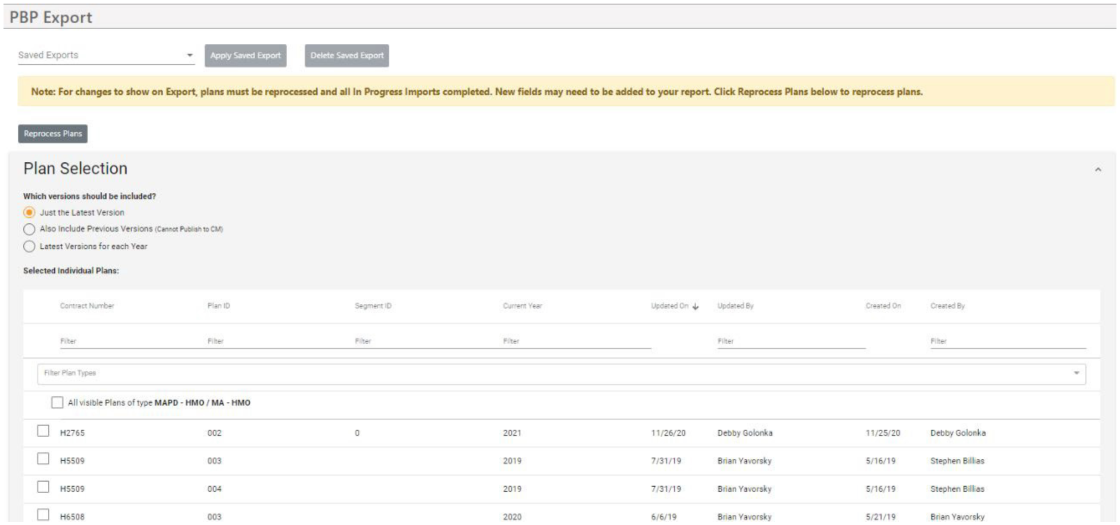
1. Just like the partial override, this full override option uses the same steps of uploading a template to be processed in the same manner as a new PBP import. This import utilized a full override data grid template with one or more plan columns to fully replace and override existing Custom Field Names. This import replaces all custom fields in one or more existing plans with matching attributes. If no matching plan exists, a new plan will be created.
2. Just like the partial override, the remainder of the process is the same as any other New PBP Import.



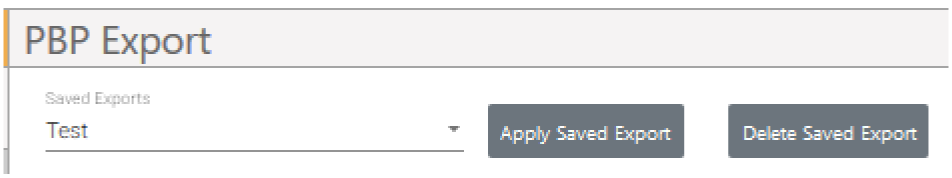
PBP Export

The PBP Export screens allow you to output transformed data to a variety of formats:

1. Select **PBP Export**. The PBP Export page displays:



2. If you have In Progress Imports, you must complete them for changes to be included in the export. Click **Reprocess Plans**. See *Reprocess Selected Plans*.
3. Optionally, you can start by selecting a previously saved selection and add that data to your current selection.



   a. Select a previously saved selection from the dropdown list.
   b. Click **Apply Saved Export**. You can choose whether to update the existing export or save the new data as a new export
      i. Select the **Update existing report "Report name"** checkbox to update the existing Export

   or

      ii. Enter a name for the new Export
   c. Click **Confirm**
   d. Alternatively, you can delete any saved export by selecting it from the dropdown list and clicking **Delete Saved Export.**

   If you select a previously saved export, you can export immediately or continue with the following steps to modify it before exporting.

4. Select which option you want to use for export. You can select a single year or multi-year format:
   a. **Select Just the Latest Version** to export one plan year, the latest completed imported version of the current contract year. In Progress imports are not included
   b. **Select Also Include Previous Versions (Cannot Publish to CM)** to export the latest imported versions and the versions that that preceded them. This choice operates within the current contract year you are working on, for example exporting side-by-side versions of the June initial loading of the data and the August rebid and reallocation version. It does not include versions from previous years.

NOTE: If you select "Also Include the Previous Version" you cannot select "Publish to CM as an Asset" as the Export type later in the Export process because the Asset must be associated with a single year. To export to CM, select "Just the Latest Version" or "Latest Version for each Year."

i. Enter a **Show Imports After Date** to see all versions created after that date

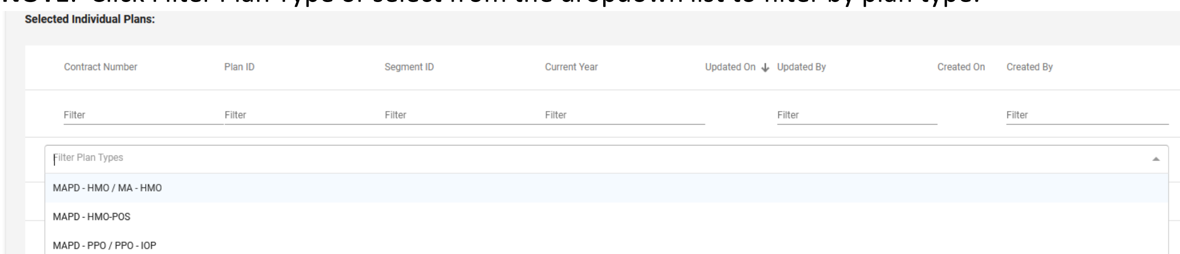
ii. Select a **# of Versions to Display** value from the dropdown list to limit the number of versions to display

c. Select the **Latest Versions for each Year** to export the latest final imported version from prior contract years you specify, for example, exporting side-by-side versions of 2019 and 2020 data that can be used for comparison when working on an ANOC.

i. Enter a value for the **# of Years to Display.** You can display multiple years of data for comparison.

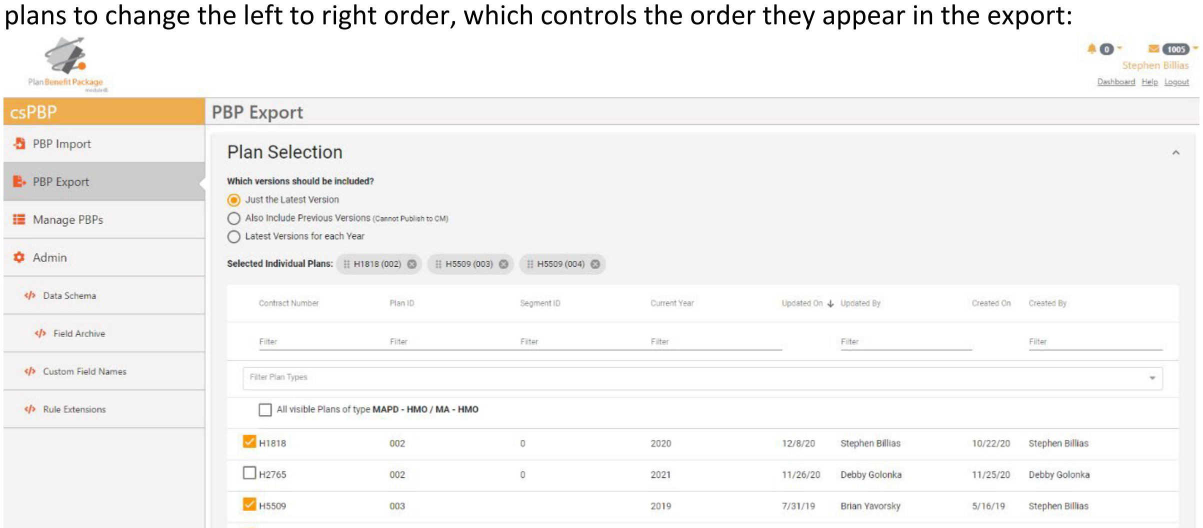
5. From the Selected Individual Plans list, select the checkboxes for the plan data you want to export.

NOTE: Click Filter Plan Type or select from the dropdown list to filter by plan type:

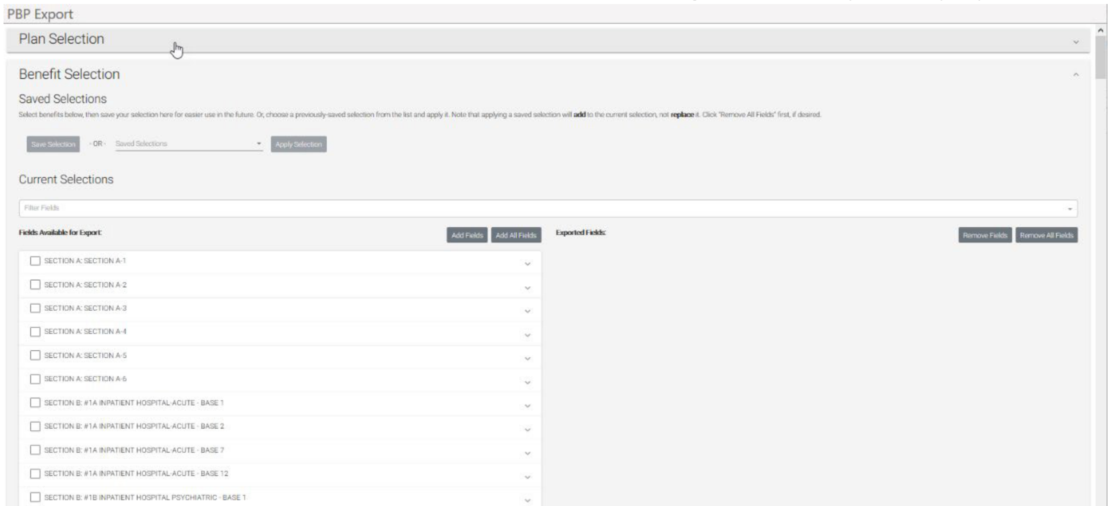


Click any of these columns: Contract Number, Plan ID, Segment ID, Current Year, Updated By, or Created By to refine and narrow your search results for export.

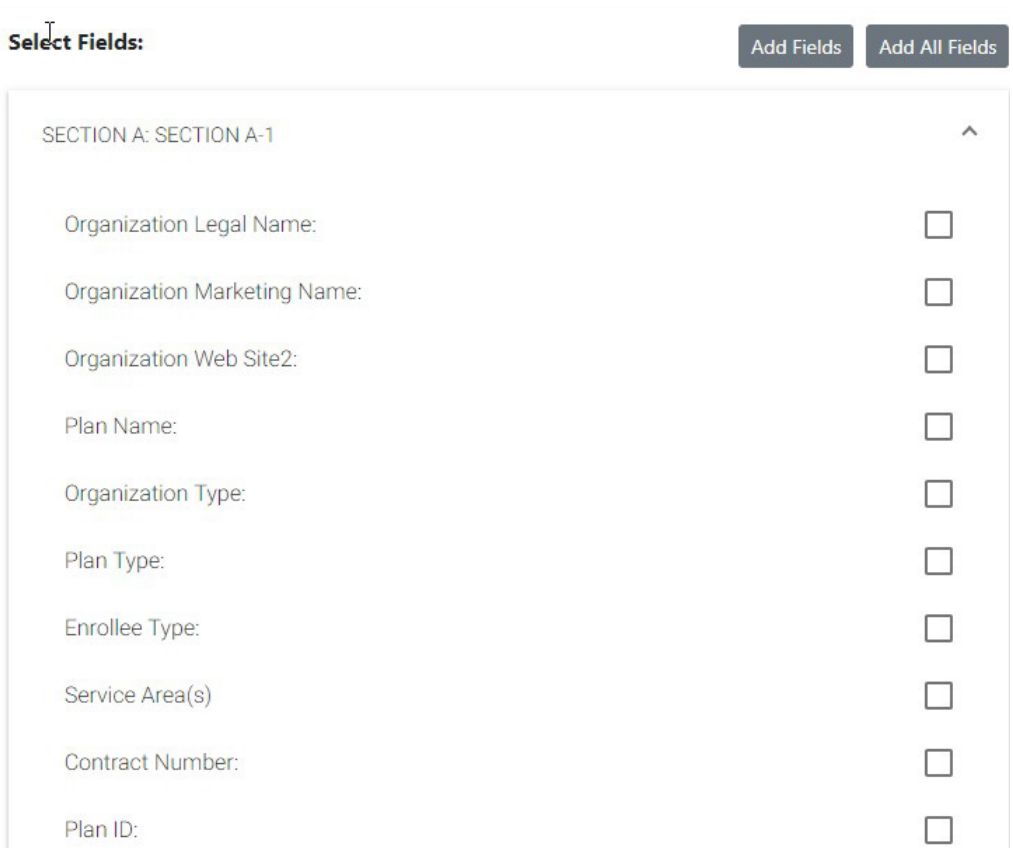
NOTE: Also note that in the display of the **Selected Individual Plans**, you can drag and drop plans to change the left to right order, which controls the order they appear in the export:



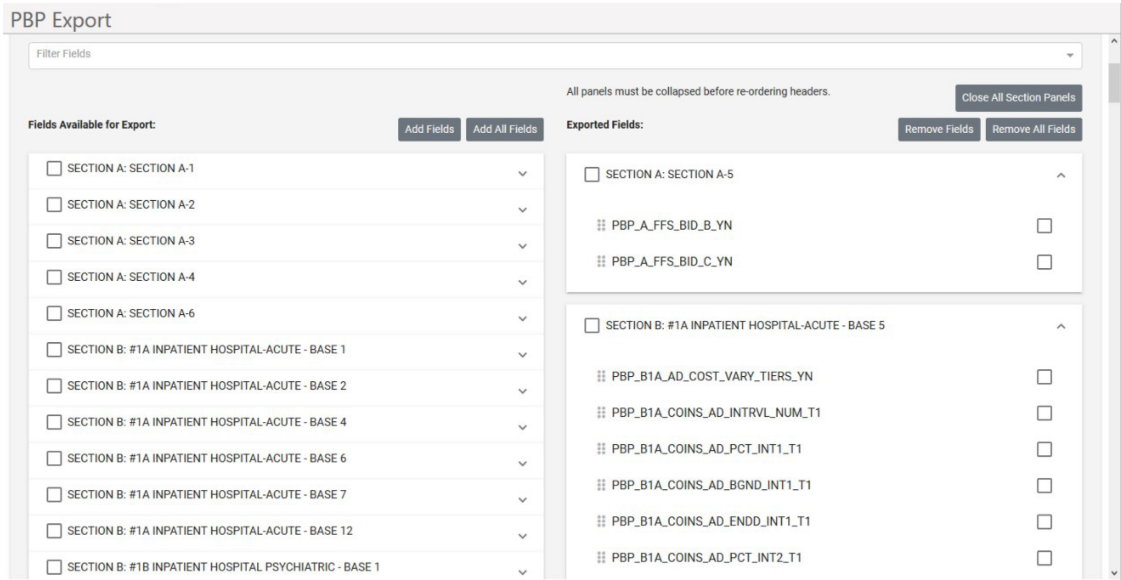
6. Click **Confirm Plans**. The Plan Selection screen for selecting fields for export displays:



7. On the left side of the page, click the dropdown arrow next to any section to see the fields available for selection:



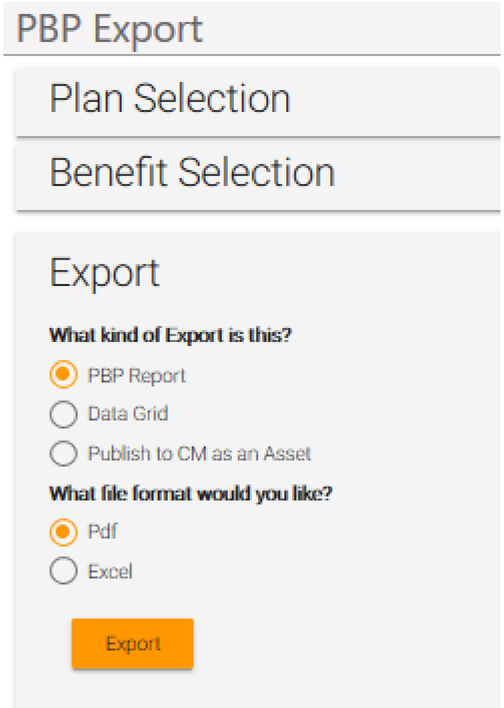
8. Select the checkboxes for the fields you want to export in each section and click **Add Fields** or click **Add All Fields** to select all fields for export. The fields are displayed on the right side of the page:



9. You can change the order of fields if you want your report to have a different ordering. Use the move icon to select and reorder fields in a section.
10. You can reorder entire sections also. Click **Close all Section Panels** to close the sections so that you can reorder them.
11. Use the move icon to select and reorder sections.
12. Select the checkboxes for the fields you want to remove in each section and click **Remove Fields** or click **Remove All Fields** to refine your choices for the export.
13. After you make your selections, you can save your selection for re-use. click **Save Export**.

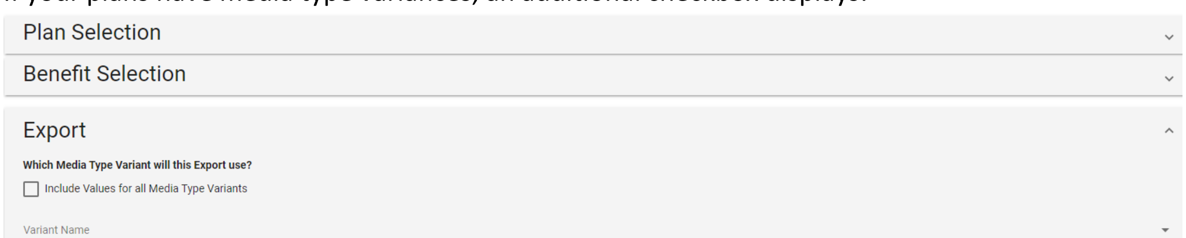
   a. **Name** your selection.
   b. Click **Confirm**.

14. When you are satisfied with your choices, click **Confirm Benefits**: The Export screen displays:



NOTE: If you selected “Also Include the Previous Version” you cannot select “Publish to CM as an Asset” as the Export type because the Asset must be associated with a year. The choice for export to CM will be greyed out in this case.

15. If your plans have media type variances, an additional checkbox displays:



    a. Select the checkbox to include values for all Media Type Variants. All variances output in the exported grid with the media type appended with a suffix, as in this example:

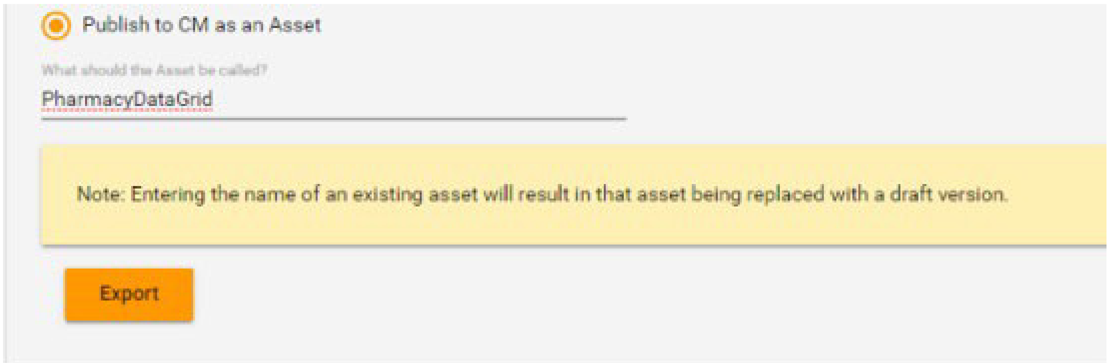
       IPHA_IN
       IPHA_IN_EOC
       IPHA_IN_ANOC

    b. If you leave the checkbox unselected, then you must select a variant from the Variant Name dropdown. The fields in the resultant grid have the same names as the custom field names, for example IPHA_IN.

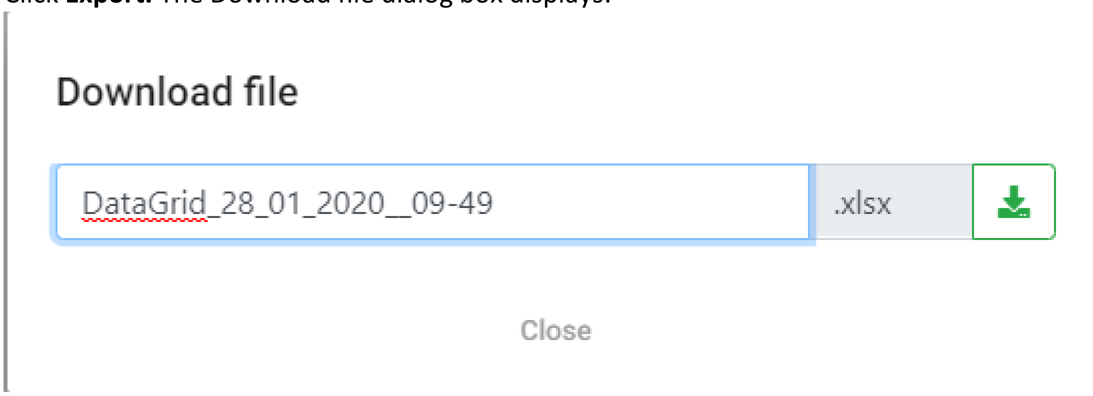
16. Select an **Export type**:
    a. **PBP report** (in PDF or Excel) emulates the CMS PBP Tool report format but from the centralized source of truth data in the CodySoft database. This is a useful export to validate the system brought in the original CMS PBP Report data properly.
    b. **Data Grid** (in PDF or Excel) creates an industry standard data master product view with benefits in rows and PBP(s) in columns with the benefits in each cell. This

format mimics the DataGrid format support by CodySoft's Collateral Management module.

c. **Publish to CM as an Asset** –is a cross-module integration choice in CodySoft. This choice automatically sends an Excel Data Grid export into the CodySoft Collateral Management (CM) module for use on the CM Asset Library Screen and for use in ANOC and EOC and other media type projects. When you choose this option, you are asked to give the asset a name. If you use a name that is the same as an asset in CM already, the assets revert to Draft status in CM.



17. Select a **file format**: PDF or Excel
18. Click **Export.** The Download file dialog box displays:

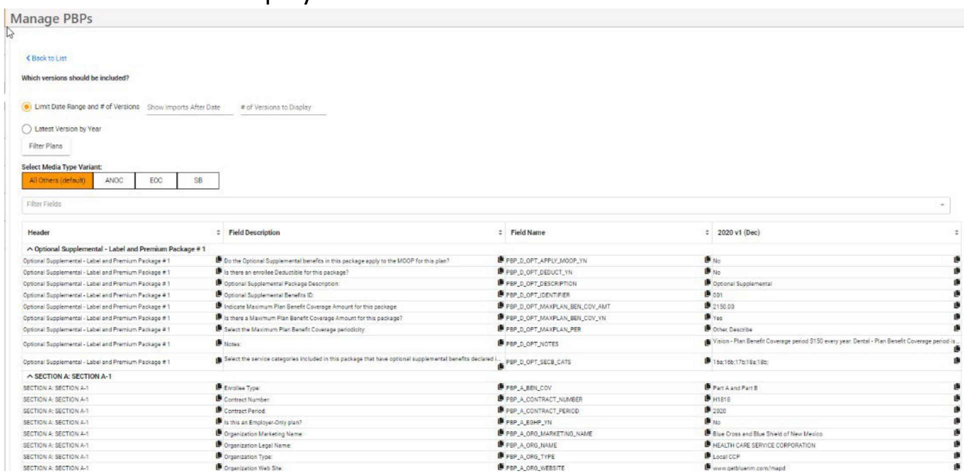


19. Name your export file. The date and time are added to the default filename automatically; you don't have to keep those values in your filename.
    NOTE: You can use spaces and dashes (-) in the filename. No other special characters are allowed.
20. Click the green download button. The plan benefit data for the Plan IDs you selected is output in the format you chose. As with any download, you can open the file immediately or save it.
    NOTE: All cells in the exported Excel file default to "Text" cell format to remain compatible with CodySoft Collateral Management import.
21. Click **Close** to complete to download process.

Manage PBPs

The Manage PBPs screen allows you to view the benefits for the plans you have you have imported already and reprocess plans after you have made changes to rules to adjust the benefits.

View Plan Benefits

1. Click the **list** icon on any row to view the list of the benefits for that plan.
   The list of benefits displays:
   

2. Select a specific **Media Type Variant** to view changes to benefits that have a Media Type Variant rule transformation set up. The default is "Global (default)" (all media type variants.) If you set up at least one other variant, the orange "Global (default)" indicator switches to "All Others (default)" and if all variants are deleted it switches back to "Global (default)".
   NOTE: If there are no media type variant rule transformations set up for this plan, this choice does not display.
   NOTE: If you change the Media Type Variant selection, a message displays while the change is being processed:
   

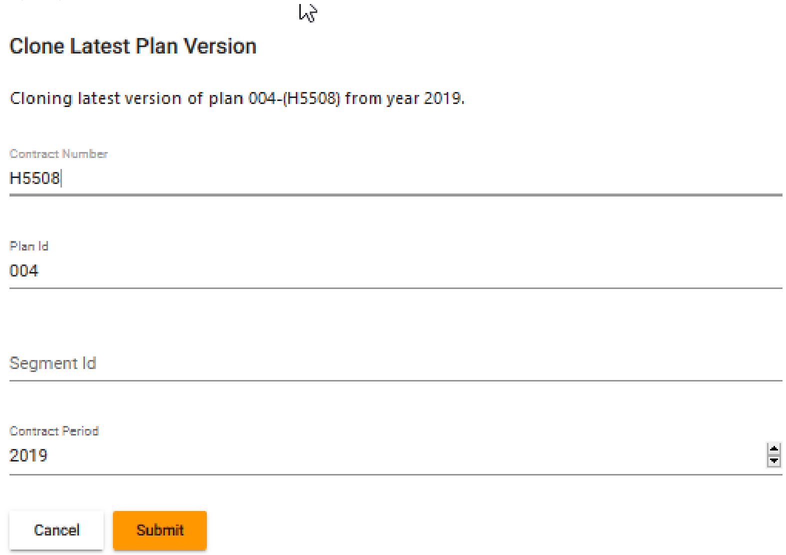
3. Use the Filters to select plan history by date range and number of versions or by year
   a. Select **Limit Date Range and # of Versions** to filter by those parameters
      i. Enter a **Show Imports After Date** to see all versions created after that date
      ii. Enter a **# of Versions to Display** value to limit the number of versions to display
   b. Select *Latest Version by Year* to filter by year
      i. Enter a value for the **# of Years to Display**
4. Click **Filter Plans.** The list is updated with your filtered selections.
5. Click **Back to List** to return the list of plans.

NOTE: Click the clipboard icon in any cell to copy that cell's text to the clipboard. This is especially useful if there is a long string of text in the cell that makes it difficult to read. You can paste this text into an email, Word document, Excel file, or anywhere that the clipboard functions.

Clone Plan

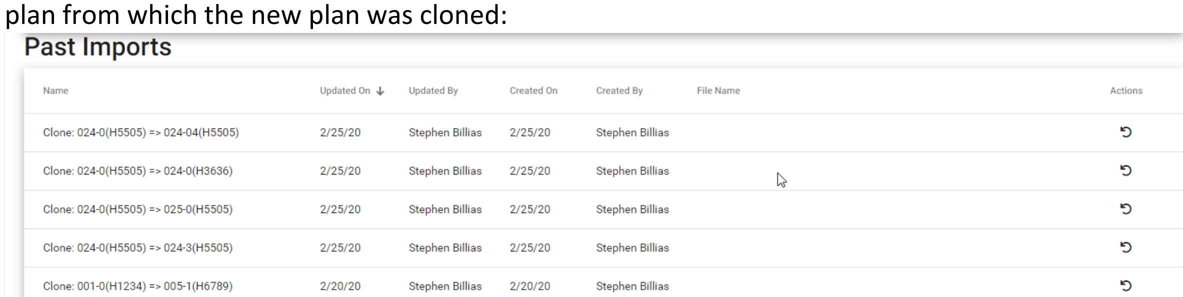
Cloning is useful if for example you are creating Employer Group Waiver Plans (EGWPs) based on existing Medicare Advantage plans.

1. Click the **clone** icon on any row to clone that plan. The Clone Latest Plan version dialog displays:



   a. Enter a replacement **Contract Number** (this field may contain additional identifying information, for example "H1234-EGWP")
   b. Enter a **Plan Id**
   c. Enter a **Segment Id**
   d. Enter a **contract period**

   NOTE: You must change at least one of the values on the Clone Latest Plan Version screen. You cannot clone a plan to itself. Also, if the plan is using an older version of the data structure you may need to re-import the file again with a new data schema. See *Upload a new PBP schema* or *Upload a new Companion schema*.
2. Click **Submit.**
3. Follow the process for a new import to review the fields, complete the edit, and complete the import of the plan. See *New Import*. When complete, the new plan displays in the Past Imports in PBP Import, with the Name field clearly identifying the plan as a clone and the plan from which the new plan was cloned:

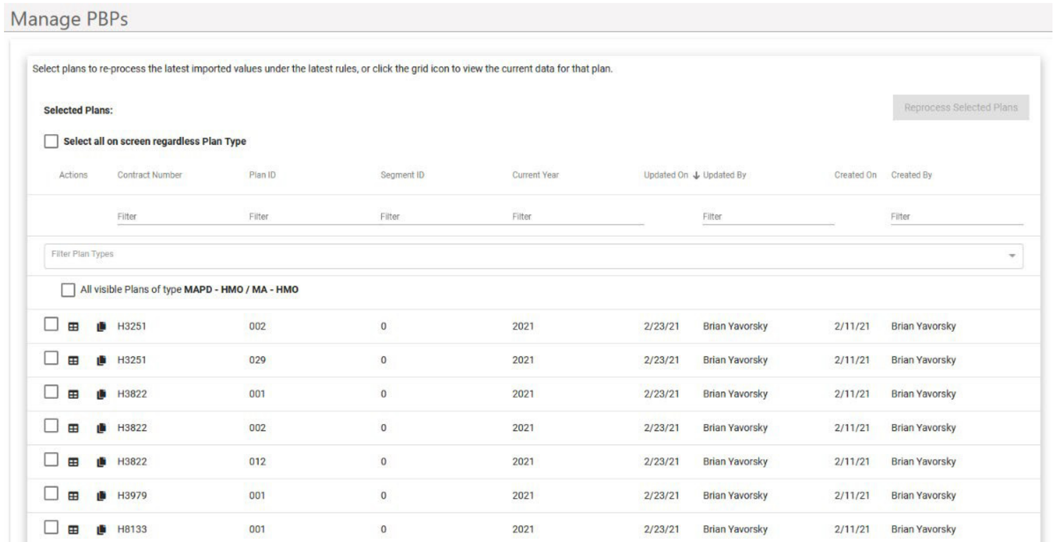


Past Imports

Name	Updated On	Updated By	Created On	Created By	File Name	Actions
Clone: 024-0(H5505) => 024-04(H5505)	2/25/20	Stephen Billias	2/25/20	Stephen Billias		
Clone: 024-0(H5505) => 024-0(H3636)	2/25/20	Stephen Billias	2/25/20	Stephen Billias		
Clone: 024-0(H5505) => 025-0(H5505)	2/25/20	Stephen Billias	2/25/20	Stephen Billias		
Clone: 024-0(H5505) => 024-3(H5505)	2/25/20	Stephen Billias	2/25/20	Stephen Billias		
Clone: 001-0(H1234) => 005-1(H6789)	2/20/20	Stephen Billias	2/20/20	Stephen Billias		

Reprocess Selected Plans

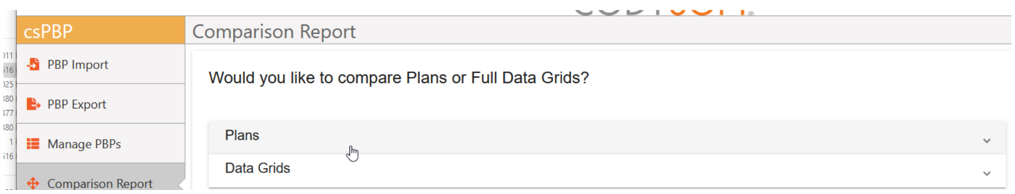
1. After you have revised the rules to adjust the benefits, select the checkboxes for the plans you want to reprocess:



   a. Select the “Select all on screen regardless Plan Type” checkbox to select all plans for reprocessing
   b. Filter by plan type and select the “All visible Plans of type [plan type chosen]” to select all plans of a specific type
   c. Select the checkboxes for individual plans to select specific plans
2. Click **Reprocess Selected Plans**.
3. **Name** the import.
4. Click **Save**. The plans are reimported as a new import.

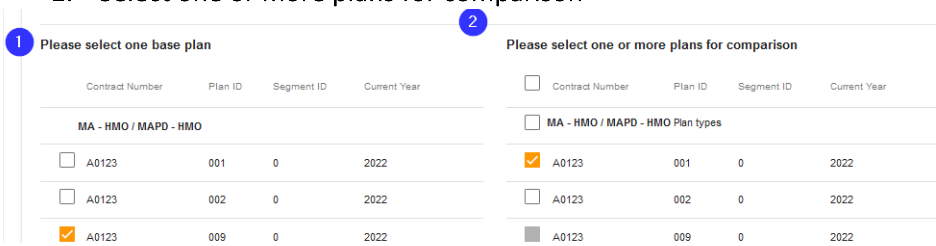
Comparison Report

Compare Plans



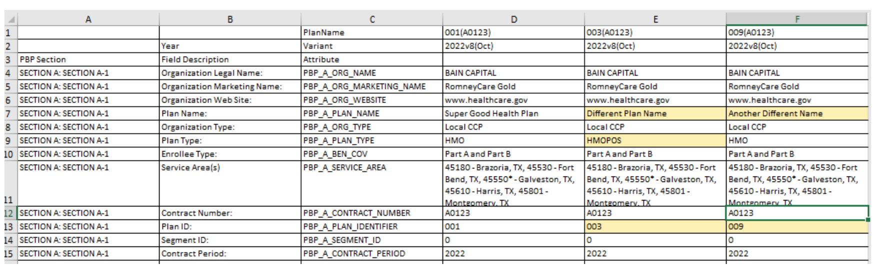
Compares a single existing PBP plan against one or more selected plans.

1. Select one base plan by checking the respective check box
2. Select one or more plans for comparison



3. Select whether to include all field types or filter only **User Generated (**custom fields) or **PBP Report Fields**
4. Click **Compare Plans** after making your selections

5. A .XLSX file will download containing the comparison report of the selected plans. Differences between the plans will be highlighted by yellow, green or red.

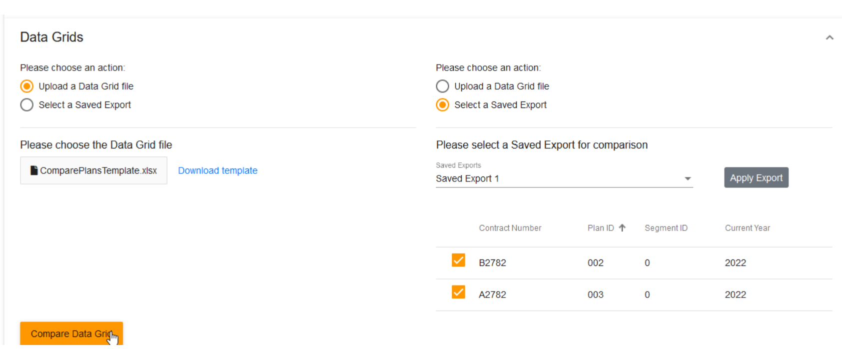


	A	B	C	D	E	F
1			PlanName	001(A0123)	003(A0123)	009(A0123)
2		Year	Variant	2022v8(Oct)	2022v8(Oct)	2022v8(Oct)
3	PBP Section	Field Description	Attribute			
4	SECTION A: SECTION A-1	Organization Legal Name:	PBP_A_ORG_NAME	BAIN CAPITAL	BAIN CAPITAL	BAIN CAPITAL
5	SECTION A: SECTION A-1	Organization Marketing Name:	PBP_A_ORG_MARKETING_NAME	RomneyCare Gold	RomneyCare Gold	RomneyCare Gold
6	SECTION A: SECTION A-1	Organization Web Site:	PBP_A_ORG_WEBSITE	www.healthcare.gov	www.healthcare.gov	www.healthcare.gov
7	SECTION A: SECTION A-1	Plan Name:	PBP_A_PLAN_NAME	Super Good Health Plan	Different Plan Name	Another Different Name
8	SECTION A: SECTION A-1	Organization Type:	PBP_A_ORG_TYPE	Local CCP	Local CCP	Local CCP
9	SECTION A: SECTION A-1	Plan Type:	PBP_A_PLAN_TYPE	HMO	HMOPOS	HMO
10	SECTION A: SECTION A-1	Enrollee Type:	PBP_A_BEN_COV	Part A and Part B	Part A and Part B	Part A and Part B
11	SECTION A: SECTION A-1	Service Area(s)	PBP_A_SERVICE_AREA	45180 - Brazoria, TX, 45530 - Fort Bend, TX, 45550* - Galveston, TX, 45610 - Harris, TX, 45801 - Montgomery, TX	45180 - Brazoria, TX, 45530 - Fort Bend, TX, 45550* - Galveston, TX, 45610 - Harris, TX, 45801 - Montgomery, TX	45180 - Brazoria, TX, 45530 - Fort Bend, TX, 45550* - Galveston, TX, 45610 - Harris, TX, 45801 - Montgomery, TX
12	SECTION A: SECTION A-1	Contract Number:	PBP_A_CONTRACT_NUMBER	A0123	A0123	A0123
13	SECTION A: SECTION A-1	Plan ID:	PBP_A_PLAN_IDENTIFIER	001	003	009
14	SECTION A: SECTION A-1	Segment ID:	PBP_A_SEGMENT_ID	0	0	0
15	SECTION A: SECTION A-1	Contract Period:	PBP_A_CONTRACT_PERIOD	2022	2022	2022

Compare Data Grids

Compares one user-uploaded data grid against a saved PBP Export or a second user-provided data grid.

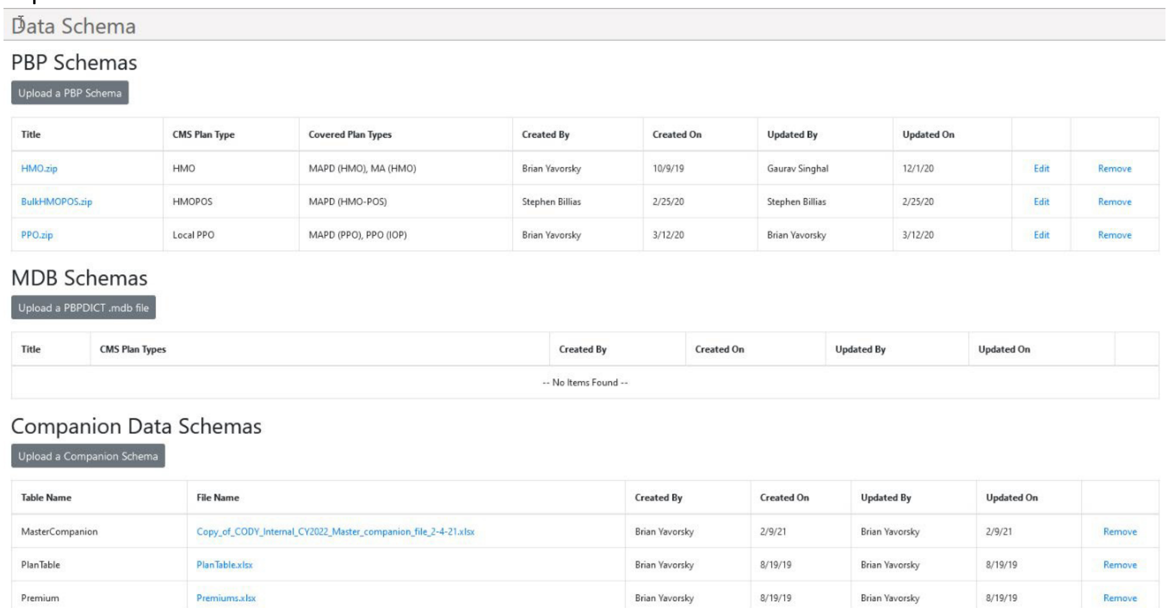
1. The single user-provided data grid must fit the format of [comparison template]
2. The second option can be another user uploaded plan or an existing plan. Note: At least one saved PBP export is required to run the comparison against existing plans.



Admin

Data Schema

The Data Schema screen lists all PBP schema and Companion Data schema files that have been uploaded. These schemas are used to define the variable elements that the PBP Module uses to import and process data when it is transformed or passed through and then made available for export.



Data Schema

PBP Schemas

Upload a PBP Schema

Title	CMS Plan Type	Covered Plan Types	Created By	Created On	Updated By	Updated On		
HMO.zip	HMO	MAPD (HMO), MA (HMO)	Brian Yavorsky	10/9/19	Gaurav Singhal	12/1/20	Edit	Remove
BulkHMOPOS.zip	HMOPOS	MAPD (HMO-POS)	Stephen Billias	2/25/20	Stephen Billias	2/25/20	Edit	Remove
PPO.zip	Local PPO	MAPD (PPO), PPO (IOP)	Brian Yavorsky	3/12/20	Brian Yavorsky	3/12/20	Edit	Remove

MDB Schemas

Upload a PBPDICT .mdb file

Title	CMS Plan Types	Created By	Created On	Updated By	Updated On	
-- No Items Found --						

Companion Data Schemas

Upload a Companion Schema

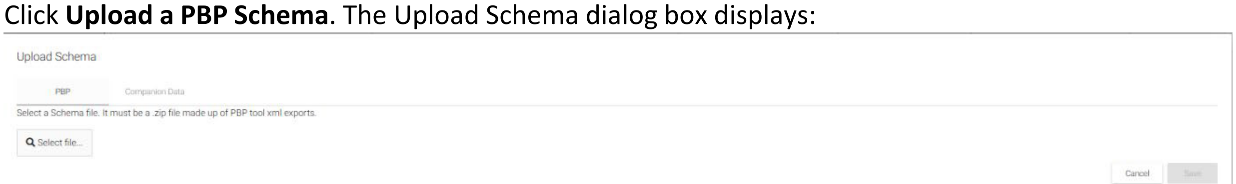
Table Name	File Name	Created By	Created On	Updated By	Updated On	
MasterCompanion	Copy_of_CODY_Internal_CY2022_Master_companion_file_2-4-21.xlsx	Brian Yavorsky	2/9/21	Brian Yavorsky	2/9/21	Remove
PlanTable	PlanTable.xlsx	Brian Yavorsky	8/19/19	Brian Yavorsky	8/19/19	Remove
Premium	Premiums.xlsx	Brian Yavorsky	8/19/19	Brian Yavorsky	8/19/19	Remove

You can edit or remove schema or add new schema, either as a .ZIP file or as an Access .mbd file.

Upload a new PBP schema

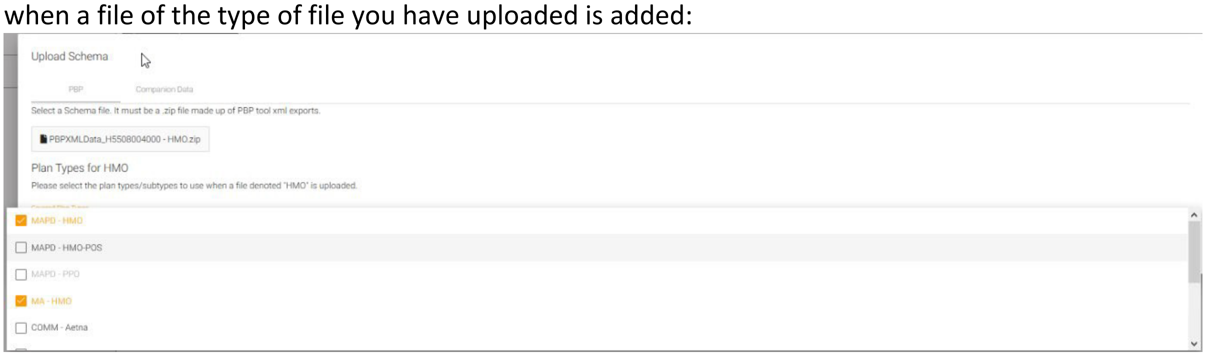
To add a new PBP schema:

1. Click **Upload a PBP Schema**. The Upload Schema dialog box displays:



NOTE: Upload a grouping of your PBP Examples to make sure you are capturing all possible fields for the plans you are offering that year.

2. After you select a file, select the checkboxes for the plan type and subtype of the to use when a file of the type of file you have uploaded is added:



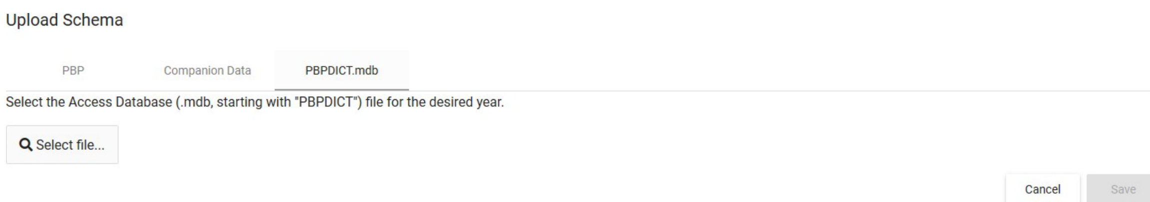
3. The new schema appears on the PBP Schema section of the Data Schema tab.

4. Upload one schema zip file that includes all sub plan variations for each plan type.

Upload a new PBPDICT .MBD file

To add a new PBPDICT .mbd file:

1. Click **Upload a PBPDICT .MBD file**. The Upload Schema dialog box displays:

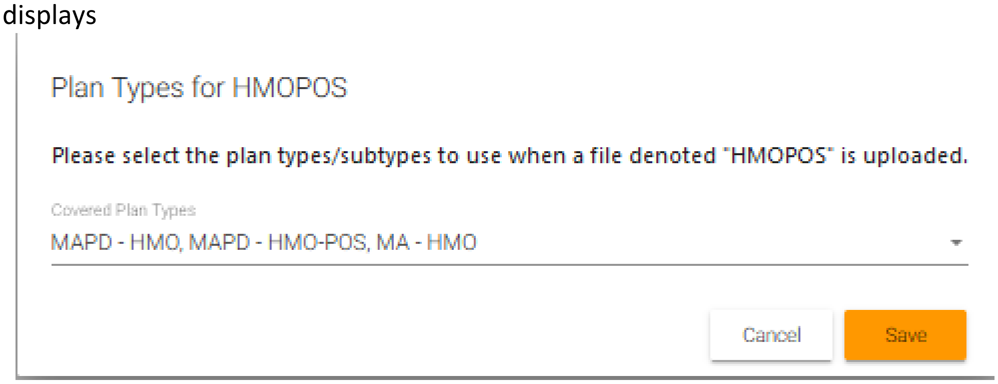


2. Select a file for the desired year.
3. Click **Save**. The file is added to the list of MDB schemas:

Edit a PBP schema

To edit a PBP schema:

1. Click **Edit** at right on the row for the PBP schema you want to edit. The Plan Types dialog displays



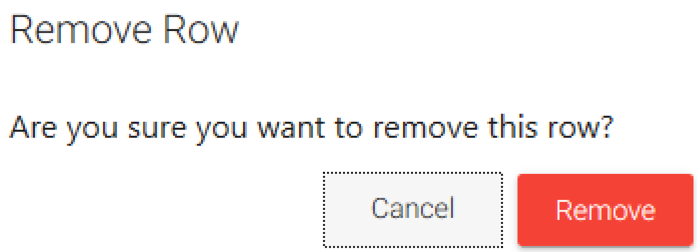
2. Edit the list of covered plan types by selecting checkboxes from the dropdown list
3. Click **Save**

NOTE: You cannot edit uploaded Companion Data schemas. You can remove them.

Remove a schema

To remove a PBP or Companion Data schema:

4. Click **Remove** at the end of the row for the schema you want to remove. The Remove Row dialog displays:

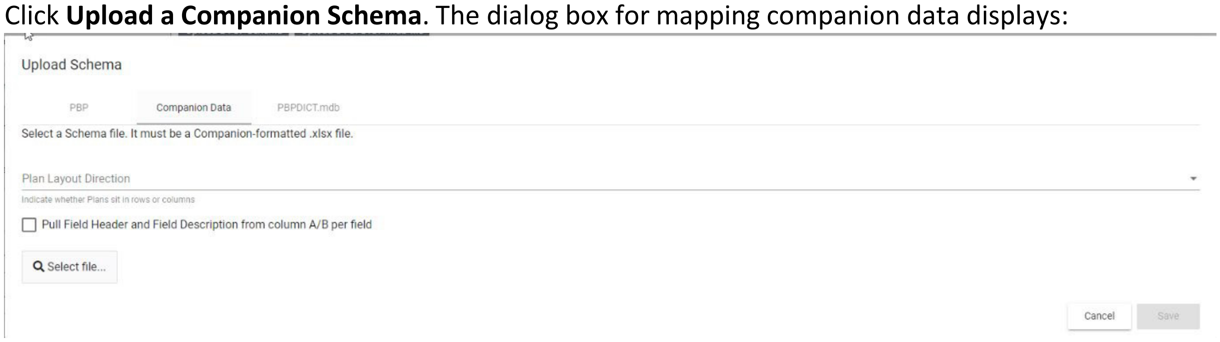


5. Click remove to remove this row from the PBP Schema section of the Data Schema tab. **NOTE**: If the schema is going to be removed permanently, then take the additional step of going to the Field Archive and removing those fields so that they don't appear in dropdowns when adding transformations or conditions. See *Field Archive*.

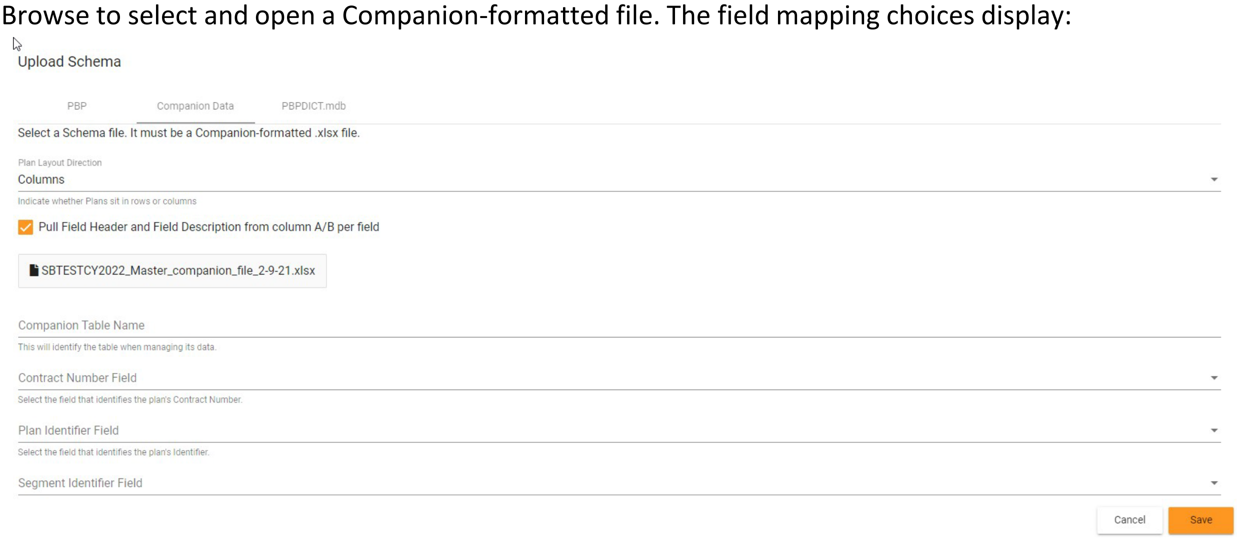
Upload a new Companion schema

To add a new Companion Data schema:

1. Click **Upload a Companion Schema**. The dialog box for mapping companion data displays:

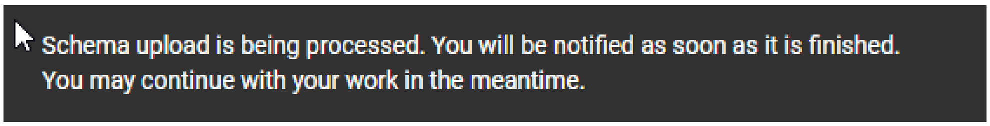


2. Select the **Plan Layout Direction** of the file you are uploading, to identify whether the plans in the file are laid out horizontally in rows or vertically in columns
3. Select the "Pull Field Header and Field Description from Column A/B per field" checkbox if you want the upload to include Field Header and Field Description for use in creating rule conditions.
4. Browse to select and open a Companion-formatted file. The field mapping choices display:



5. Map the fields from the companion data file to the fields in the dialog box:
    a. **Companion Table Name**—Enter a name for the companion table according to your company's naming conventions.
    b. **Contract Number Field**—From the dropdown list, select the field that identifies that plan's contract number

   c. **Plan Identifier Field**—From the dropdown list, select the field that identifies that plan's identifier
   d. **Segment Identifier Field**—From the dropdown list, select the field that identifies that plan's segment
   e. **Contract Period Field**— From the dropdown list, select the field that identifies the plan's contract period (usually the contract year, for example, CY2020)
6. Click **Save**. The companion data file is added to the list of Companion Data schemas.
   NOTE: You may have to edit your companion data file in advance to make sure that you have the correct fields to map to the required fields for the schema.
   NOTE: A message displays while a PBP Schema, PBDDICT .mdb file, or companion data schema is being uploaded:

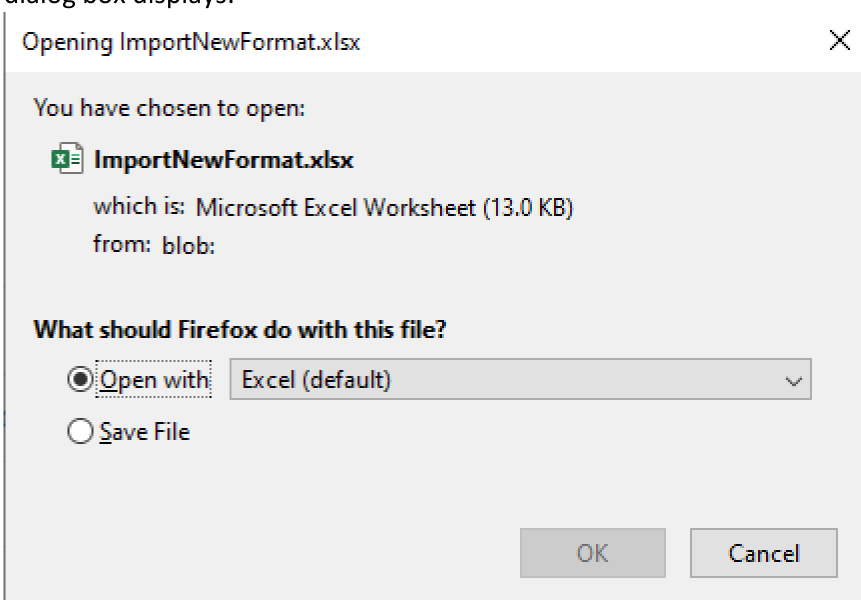


   When the upload is complete, refresh the screen to view the updated list.

Download a PBP schema, PBPDICT .mbd file, or Companion schema

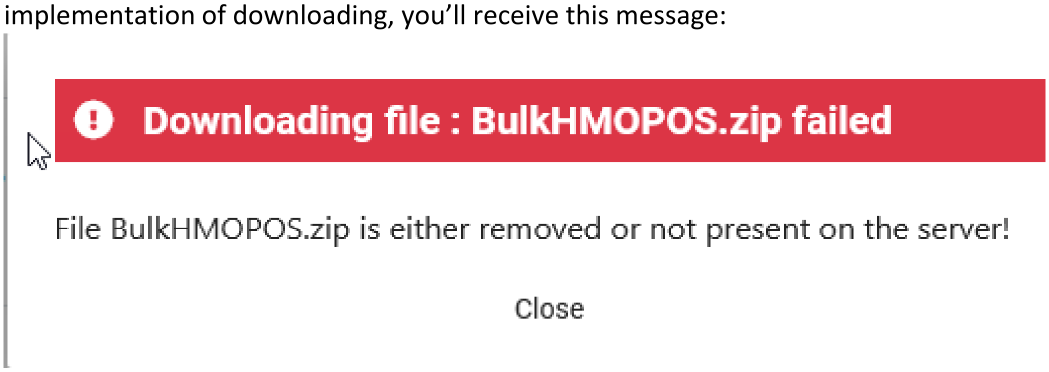
You can download a PBP schema, PBPDICT .mbd file, or Companion schema.

1. Click the blue-highlighted filename for the item you want to download. The download dialog box displays:



2. Open the file in Excel or Save it.

NOTE: Older files are not downloadable. If you try to download a file that was uploaded prior to the implementation of downloading, you'll receive this message:

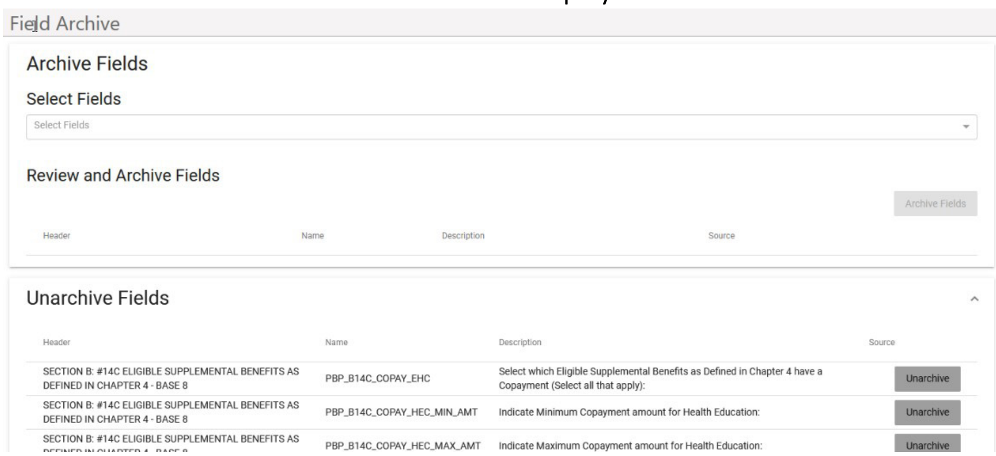


Field Archive

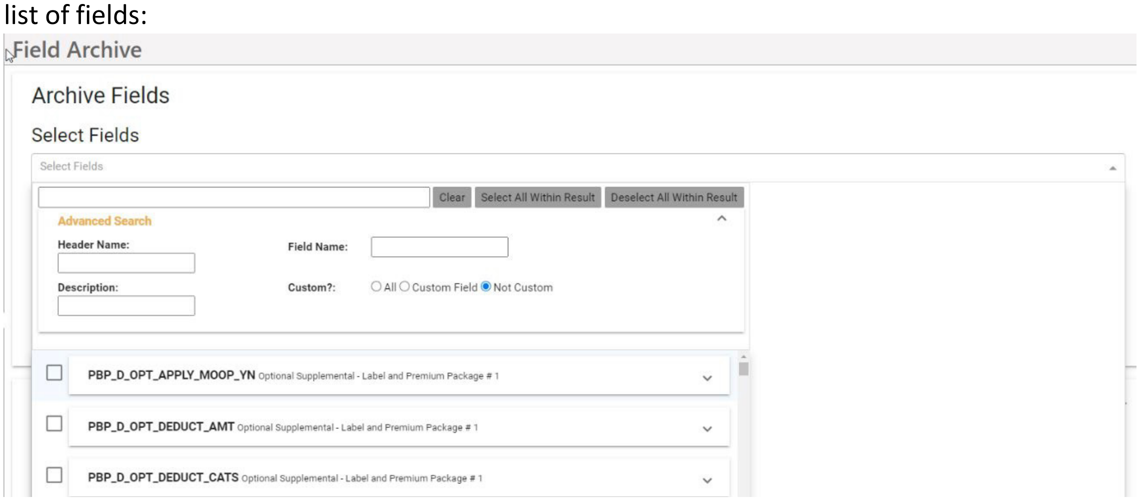
The set of fields that comprise a PBP report change every contract year. Old fields are removed, and new fields added. You may have outdated fields in your schema that you don't want to appear as choices in dropdown lists throughout the module. The Field Archive allows you archive and hide original field names from the imported PBP Report fields that are no longer valid. A field is considered unused when it is not a part of the new contract year's set of fields, and is not in use in any PBP, (does not have a value for that field in any of the PBPs). Archived fields still show up in dropdown lists on the Manage PBPs, Import, and Export screens where they have a value, but will be hidden from the Custom Field Names screen and other field searches. You can also unarchive fields as necessary.

To archive unused field(s):

1. Click **Field Archive.** The Field Archive screen displays:

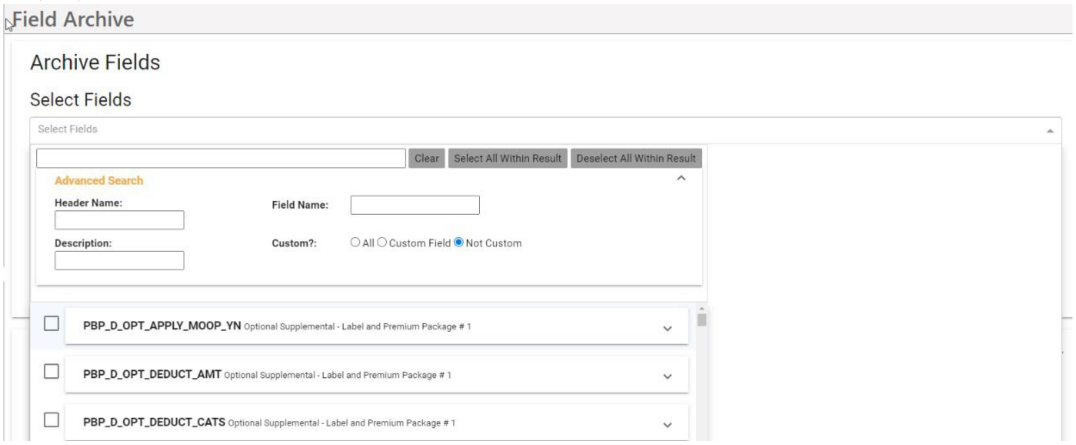


2. **Select Fields** to find specific fields you want to archive. The Search fields display with the list of fields:



3. Use **Advanced Search** to further refine your search criteria. Filter by these choices:
   - **Header Name**
   - **Field Name**
   - **Description**
   - **Custom?** — The only valid choice is Not Custom. Select **Not Custom** to search by one of these criteria search those fields that use the original field names from the imported PBP Report.

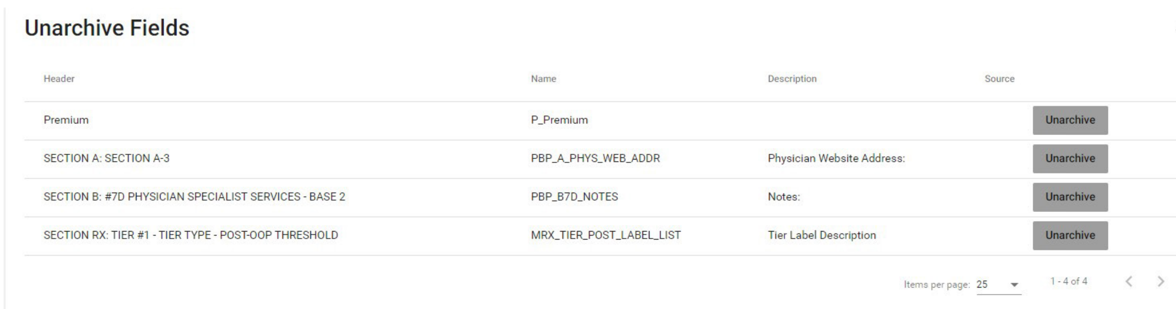
4. Use the **Clear**, **Select All Within Result**, and **Deselect All Within Result** buttons as needed to help you refine your search. When you have made selections, the Archive Fields button displays:



5. Click **Archive Fields**. The selected fields are archived and will no longer appear in dropdown lists on the Manage PBPs, Import, and Export screens in the module. The archived fields are listed in the Unarchive Fields area of the Field Archive screen.

To unarchive archived field(s):

1. Click **Unarchive** on any field to restore it to the list of available fields. The field is removed from the list and restored to the lists of available fields in the module.



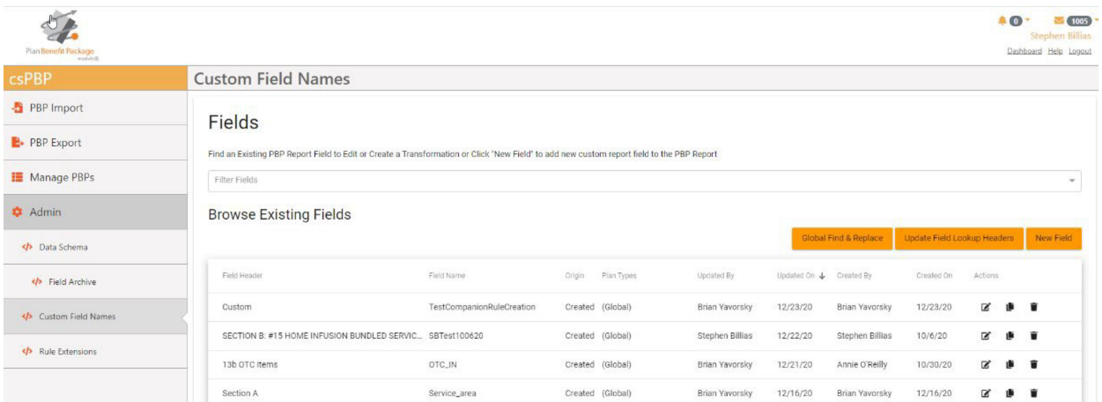
NOTE: When you unarchive a field, it won't be immediately available on the Search screen in Field Archive. If you exit Field Archive and return to this screen, the field will be searchable again for archiving.

Custom Field Names

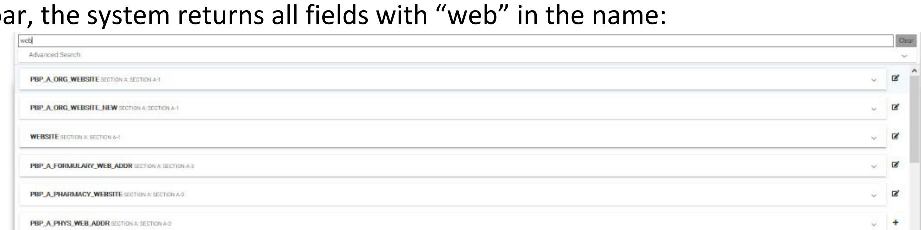
The Custom Field Names tab screen lists all transformation-specific rules that have been created for Data Grid fields. You can add a new rule, edit, or remove existing rules, search for specific fields, globally find and replace text within a rule in either the Condition IF section or the Transformation Value section, find and replace changed CMS field headers, and clone fields from this screen.

Filter Fields

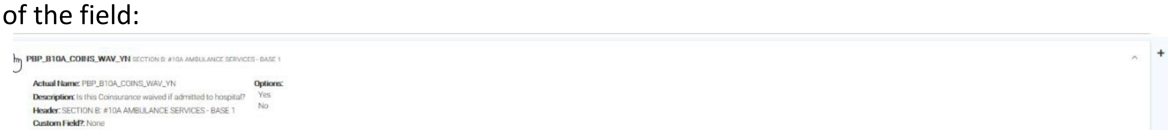
1. Click in the **Filter Fields** bar to locate a field for which you want to write a new rule, or browse the list of existing fields:



or to locate a row you want to edit or remove. For example, if you enter “web” in the Filter Fields bar, the system returns all fields with “web” in the name:



2. Click the down arrow at the end of any row or any part of the row for that field to see the details of the field:



- **Section**—What section of the PBP report the field is in
- **Actual Name**—The original field name in the PBP Report
- **Description**—The text from the PBP Report that describes the field
- **Options**—If a multi-choice field, Options details the available choices for the field, for example “Yes” or “No”
- **Header**—What header the field came from
- **Custom**? —Whether the rule has defined a custom name for the field. If the original field name is used, the value is None.

These details may help you to refine or revise the rule.

3. Click **Clear** to clear your search criteria

4. Click **Advanced Search** to further refine your search criteria. The Advanced Search area displays:

5. Filter by these choices:
   - **Header Name**
   - **Field Name**
   - **Description**

6. When you have narrowed your search, click the edit icon to edit the existing field. A popup window displays for Edit Transformation. See *Edit Transformation Field.*

PBP Report Field Name Acronyms

Use this list of common PBP Report field name acronyms to help you search and filter on fields:

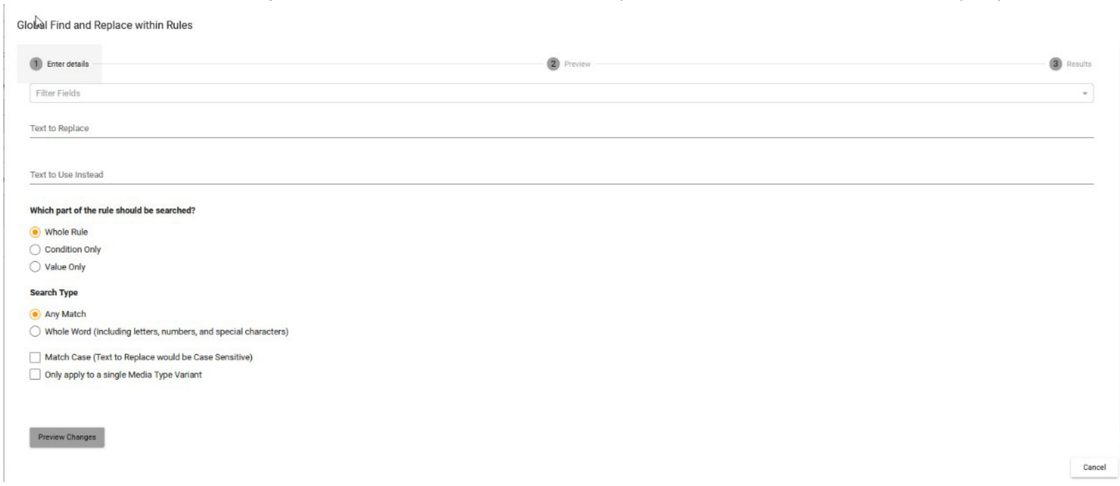
- "PBP_": As much as 90 percent of the fields that come from a raw PBP report start with PBP_. Cody's PBP Module does not allow a user to create a custom field with a "PBP_" prefix. Anything that starts with PBP_ came from a PBP report from CMS Bid software. Other raw CMS bid data elements do not start with PBP_, for example, MRX_.
- "_A1_" or "_B3": Indicates the PBP report section or Benefit Category section. B3 for example is Section B, #3 benefit category for Cardiac Services.
- "_YN": A YN suffix indicates that the field in question is a Yes/No choice answer only in bid software
- "_COPAY_": A copay related field (as opposed to related to Coinsurance or Deductible, or Max Amts)
- "_COINS_": A coinsurance related field (as opposed to related to Coinsurance or Deductible, or Max Amts)
- "_AMT_": Indicates a $ amount, for example in COPAY values
- "_PCT_": Indicates a % amount, for example in COINS values
- "_MIN" or "_MAX": indicates a minimum vs maximum range of values for example in COINS or COPAY amounts. MAX can also refer to other enrollee maximums like Out-of-Pocket Maximum but is typically paired ENR or MAXENR
- "_AUTH": dealing with a Prior Authorization field
- "_REF": A Referral Field
- "_EHC": A field that is multi-choice selection or list with "Select all that Apply". For example, PBP_B3_COPAY_EHC would be select all Services that have a copayment within the B3 possible services (Cardiac Rehab, Intensive, SET PAD, Pulmonary)
- "_DED_": Deductible related fields
- "_MC_" vs "_NMC_": These acronyms distinguish between Medicare Covered vs Non-Medicare Covered benefits. For example, PBP_B1A_COPAY_NMCS_AMT vs PBP_B1A_COPAY_MC_AMT is difference between amount for Medicare covered stay vs non-Medicare covered stay within the Inpatient Hospital benefit category
- "_NTRVL#" or "_T#" distinguish an Interval Number or a Tier Number. INTRVL1 or T1 is First Interval or Tier 1
- "_BGND" or "_ENDD": are used with intervals to distinguish the Beginning and the End of Interval ranges.
- "_NUM": references a number, for example, how many days or stays
- "_CATS": dealing with a list of benefit categories. Can be used instead of or in place of "_EHC"

- "_PER": Is seen when dealing with Periodic values or choosing a period like Every three years vs every year
- "_NOTES_": A Special Notes field in that Category
- "ADDL", "COMB", "BEN", "BENDESC", "LBL", "CSTSHR" are shortened forms for words used in benefit descriptions such as Additional, Combined, Benefit, Benefit Description, Label or Cost Share. These typically match up to a benefit question, for example, Additional Days or Combined Deductible
- "MRX_" an Rx Drug benefit
- "GAP", "MOSTD", MOSPFD", "RSTD", "RSPFD", "LTC": Denotes different drug types like GAP, Mail Order, Retail, and Long-Term care. STD is Standard. PFD is Preferred
- "1M" or "2M" or "3M" are typically used with Rx benefits to denote 1,2, or 3-month supplies
- "_TIER_": used to denote Rx tiers
- "_OON_": Denotes an out of network benefit

Global Find & Replace

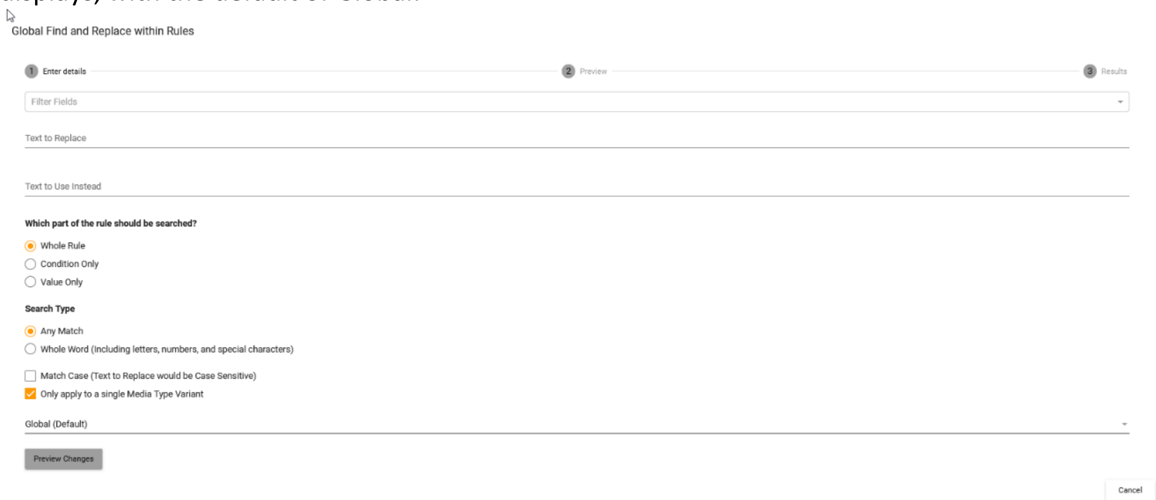
You can globally find and replace text within a rule in either the Condition IF section or the Transformation Value section.

1. Click **Global Find & Replace.** The Global Find and Replace within Rules wizard displays:



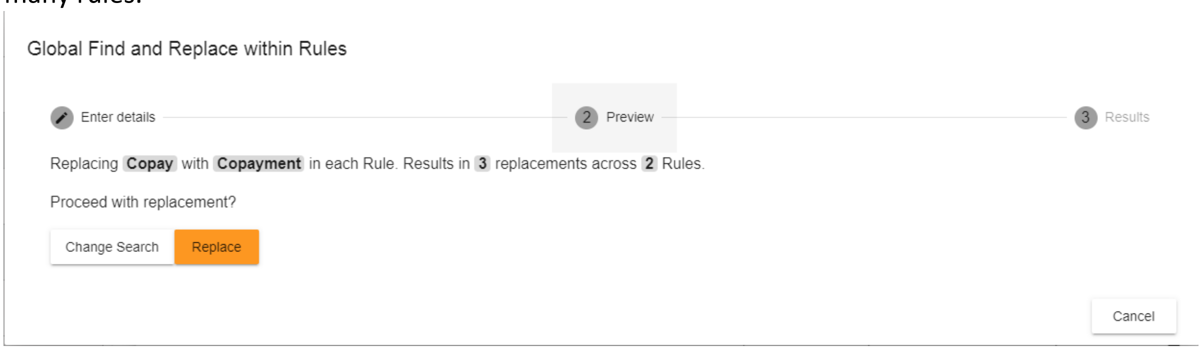
2. Optionally select Filter Fields if you want to find and replace on a subset of fields rather than globally. See *Filter Fields*.
3. Enter a text string to search for in the **Text to Replace** field
4. Enter the replacement text in the **Text to Use Instead** field
5. Select whether to search the whole rule, the condition portion of the rule only, or the value portion of the rule only
6. Select whether to search for any matching results or only for whole words, including letters, numbers, and special characters

7. Optionally select the checkbox to search for a single Media Type Variant. A dropdown list displays, with the default of Global:

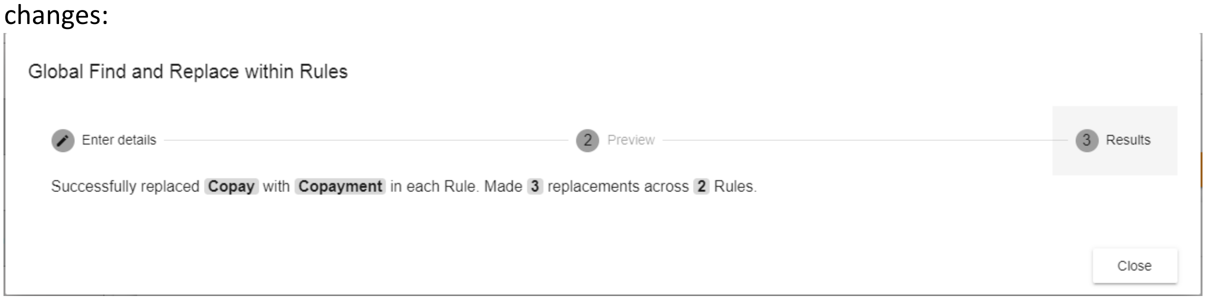


   a. From the dropdown list, select a single Media Type Variant to refine your search

8. Optionally select the checkbox to Match Case when finding and replacing text.
9. Click **Preview Changes.** The wizard displays the text you searched for and the replacement text, as well as how many replacements will result from your find and replace and in how many rules.



10. Click **Replace** to make the replacement or click **Change Search** to revise your search criteria. If you choose to make the replacement, the wizard provides a summary of the changes:

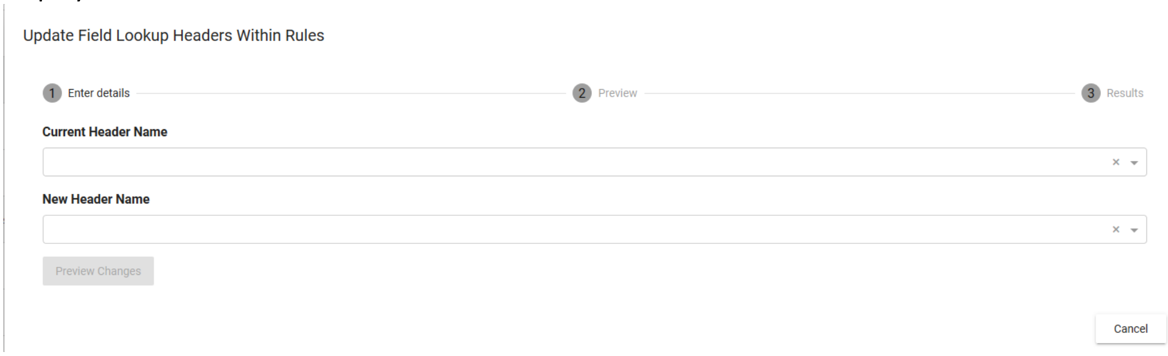


11. Click **Close** to exit the Global Find & Replace wizard.

Update Field Lookup Headers

You can find and replace changed PBP Report Headers when CMS changes header names or moves benefits between screens in the HPMS software that is used to create the PBP Reports. For example, CMS might change Section B:#3 Cardiac – BASE 3 to another header like Section B:#3 – Cardiac – BASE 1. When you produce a new year over year Import, for example, Import CY20 versus CY21, the PBP Module flags changes. Changed headers display as red (deleted) and green (added) pairs. Use **Update Field Lookup Headers** to make these replacements.

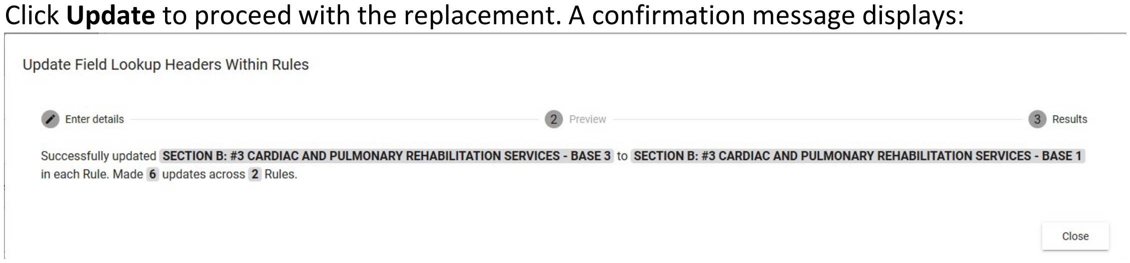
1. Click **Update Field Lookup Headers**. The Update Field Lookup Headers Within Rules dialog displays:



2. Select a **Current Header Name** from the dropdown list.
3. Select a **New Header Name** from the dropdown list
4. Click **Preview Changes**.
    a. If no usages of the Header Name are found, click **Change Criteria** to return to the dialog box.
    b. If changes are found, the dialog displays a count of the number of updates found in and the number of rules in which they are found.
    c. Click **Change Criteria** to redo the search

    OR

    d. Click **Update** to proceed with the replacement. A confirmation message displays:

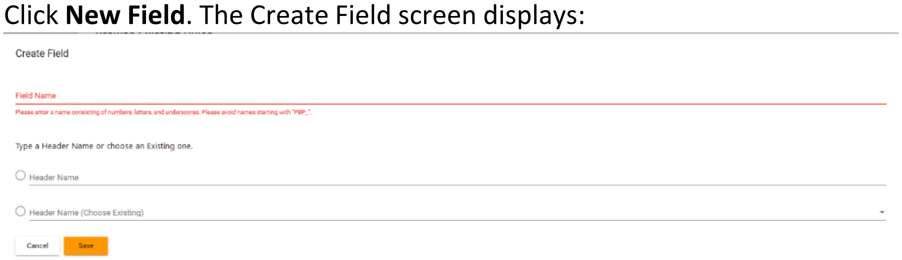


5. Click **Close**.

New Field

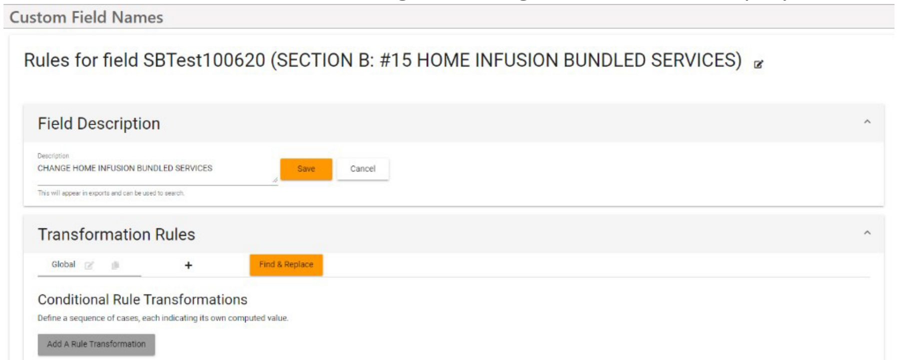
You can create a new field from the Custom Field Names tab. Use New Field to create a new value that isn't in original PBP Report but needs to be added as complementary to the PBP Report or is constructed using a complex sentence or pieces of different PBP report values. Examples might include Inpatient Hospital or Skilled Nursing Facility (SNF) fields that combine separate fields in the PBP Report into a single field that includes a dollar amount with an interval, for example: “$100 per day for Days 1-5.” You can combine values from both PBP and Companion Data tables in a single field also.

1. Click **New Field**. The Create Field screen displays:

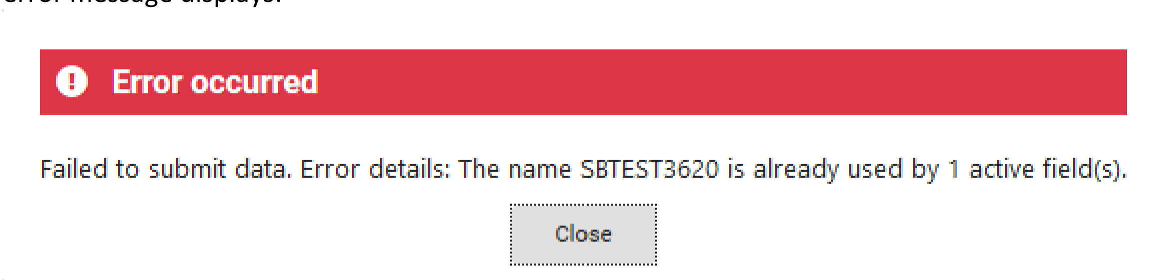


2. Enter a new **Field Name.**
   NOTE: No spaces or special characters other than underscore (_) are allowed in the field name.

3. Enter a **Header Name**
   OR:
4. Select a **Header Name** from the dropdown list of existing header names
   NOTE: You can enter the first few letters of the section name to search for it instead of scrolling through the entire list.
5. Click **Save**. The screen for creating or editing rules in a field displays:



NOTE: Field names must be unique. If you try to save a new field that exists already, an error message displays:

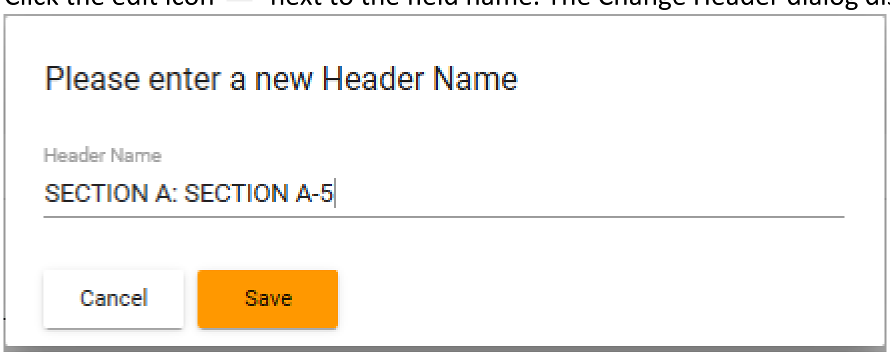


6. Click **Close** and reenter the field with a unique name.

Change Header

You can change the header which is associated with the field:

1. Click the edit icon next to the field name. The Change Header dialog displays:



2. Click in the Header Name field
3. Enter a new header name or select the checkbox for a new header from the dropdown list
   NOTE: You can enter the first few letters of the section name to search for it instead of scrolling through the entire list.
4. Click **Save**

Field Description

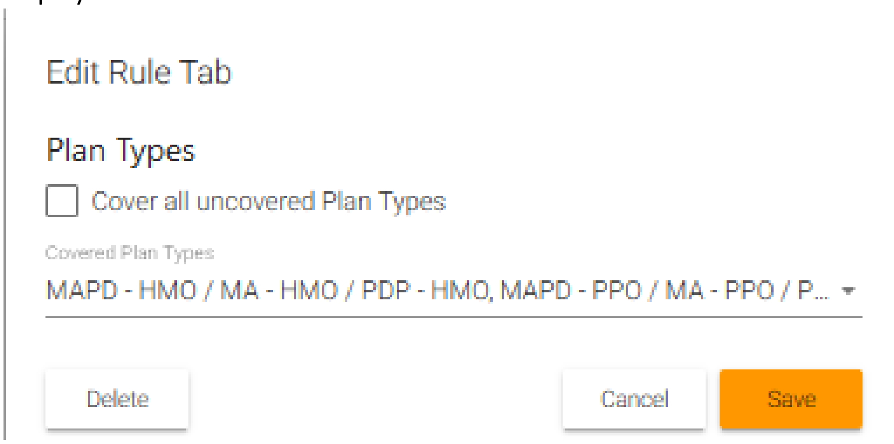
1. Enter a **description** that will be included in the export and can be used to search for fields.
2. Click **Save**

Transformation Rules

In the top part of the Transformation Rules area, you can change the list of plan types to which the rules apply.

Edit Plan Types list

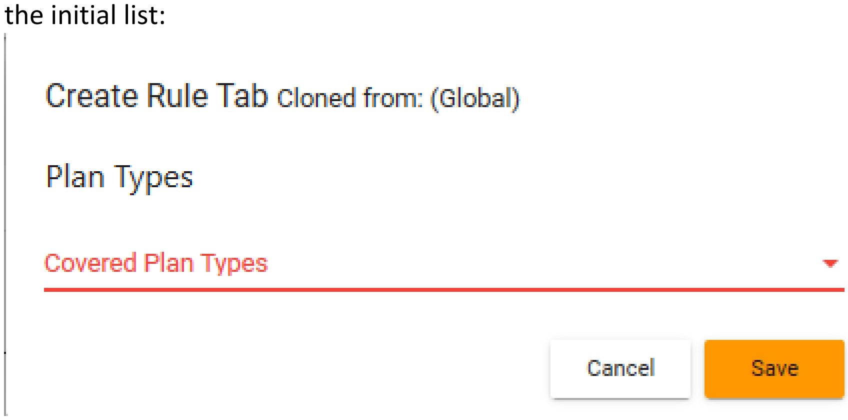
1) Click the edit icon to change the list of plan types. The Edit Rule Tab dialogue displays:



2) Select additional plan types from the dropdown list.
3) Select the checkbox for “Cover all uncovered Plan Types” to apply the rule globally to include any plan type that isn’t already in the list
4) Click **Save**

Clone Plan Types list

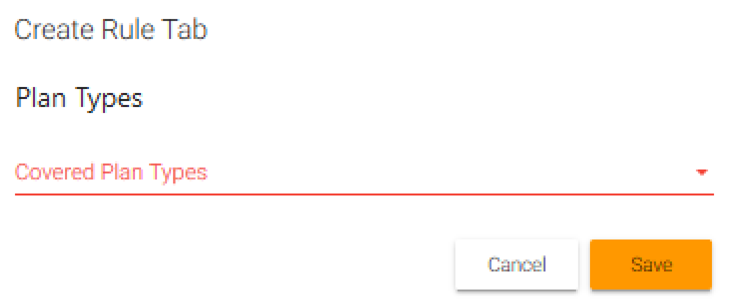
1) Click the clone icon to make a copy of the rule tab for another set of plans based on the initial list:



2) Select additional plan types from the dropdown list.
3) Select the checkbox for “Cover all uncovered Plan Types” to apply the rule globally to include any plan type that isn’t already in the list
4) Click **Save**

Add a new plan types list

1) Click the **+** icon to add a new plan type list:

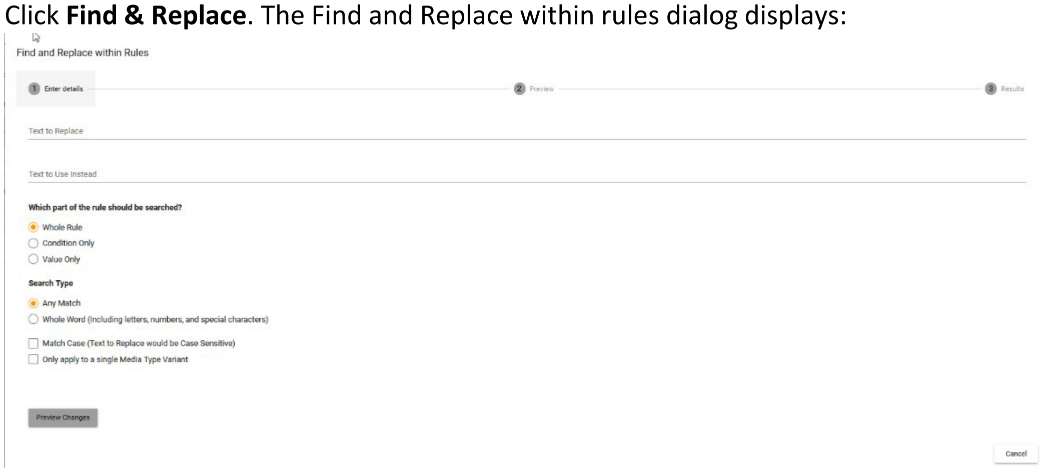


2) Select a plan type from the dropdown list
3) Click **Save**. The plan type is added to the list of covered plan types

Find & Replace

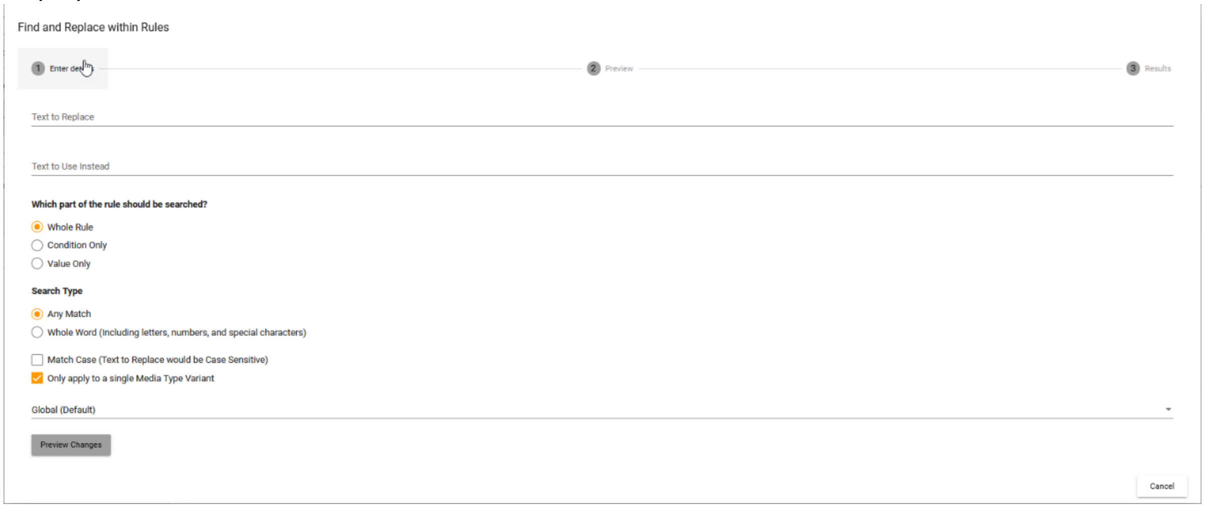
You can search and replace values specified in quotes across all plan types for the rule you are in.

1) Click **Find & Replace**. The Find and Replace within rules dialog displays:



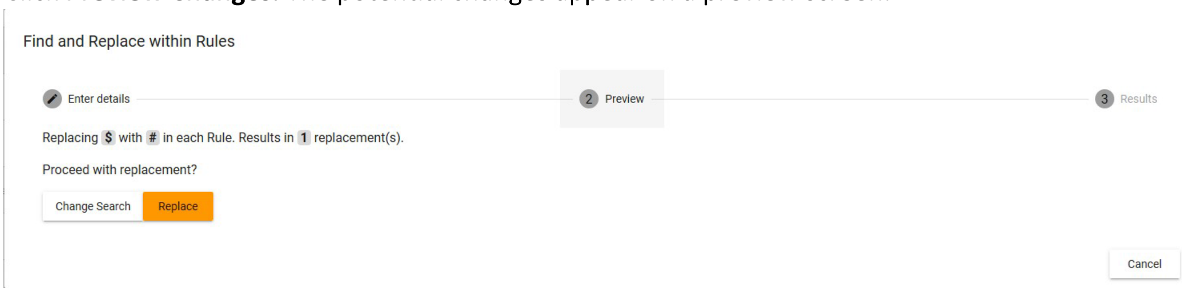
2) Enter the **text** you want to search for within the rule
3) Enter the **text** you want to use as the replacement
4) Select the appropriate **button** to search for the text to be replaced in the whole rule, or only in the condition, or only in the value transformation field
5) Select whether to search for any matching results or only for whole words, including letters, numbers, and special characters

6) Optionally select the checkbox to search for a single Media Type Variant. A dropdown list displays, with the default of Global:

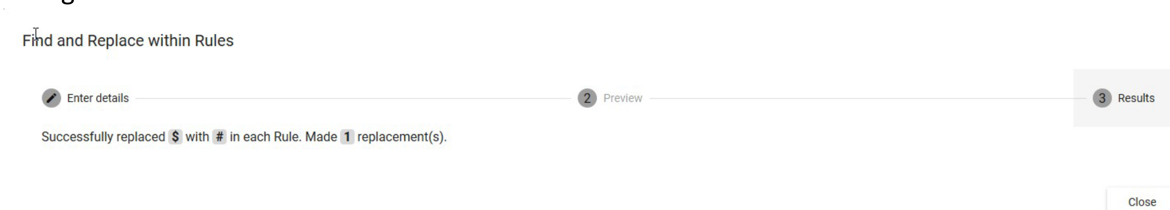


a. From the dropdown list, select a single Media Type Variant to refine your search

7) Optionally select the checkbox to Match Case when finding and replacing text.
8) Click **Preview Changes.** The potential changes appear on a preview screen.



7. Click **Replace** to make the replacement or click **Change Search** to revise your search criteria. If you choose to make the replacement, the wizard provides a summary of the changes:



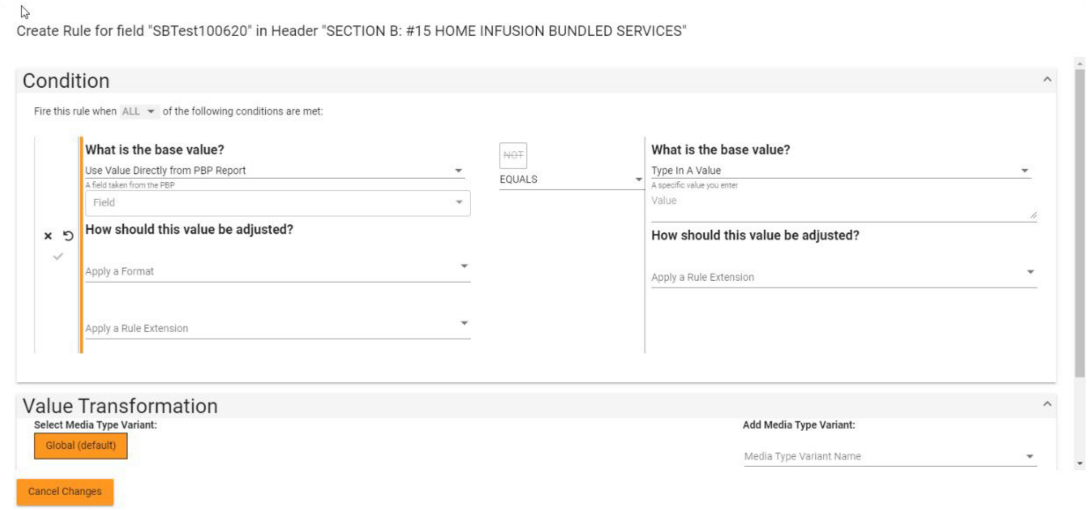
8. Click **Close** to exit the Find & Replace wizard.

Add Transformations

In the Edit Transformations section, you can add logic strings to make several conditional transformations based on business rules.

1. Click **Add A Rule Transformation**. The Create Rule dialogue displays:

2. Click **Add a Condition**. The fields for the Condition display, with the fields for the left-hand side of the expression on the left and the fields for the right-hand side of the expression on the right, separated by the EQUALS/NOT EQUALS dropdown in the center.
3. Select a **Condition Type** from the dropdown list.

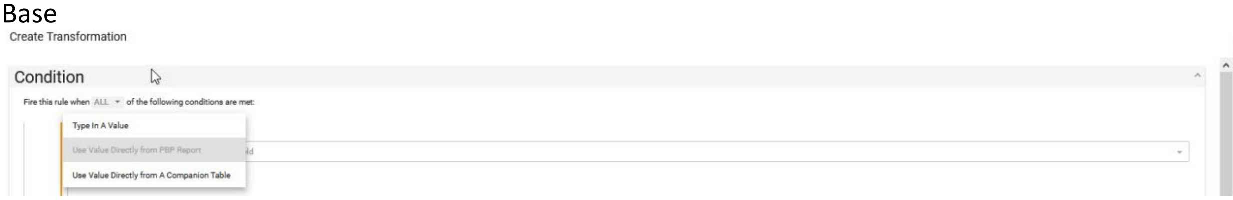


Currently the available values are:

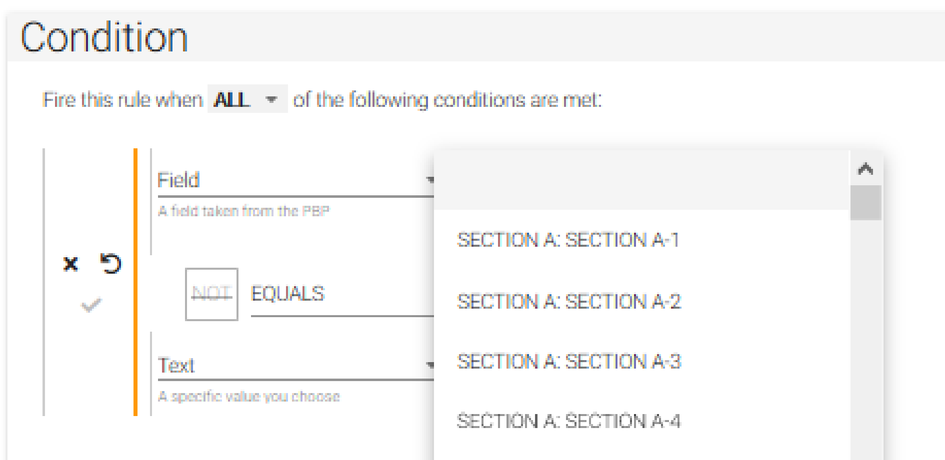
- **ALL**—Requires that each of a list of conditions be met
- **ANY**—Requires at least one condition to be met

4. On the left side select whether to enter text to use in the condition, or to use a field from the PBP or from a Companion Data table:

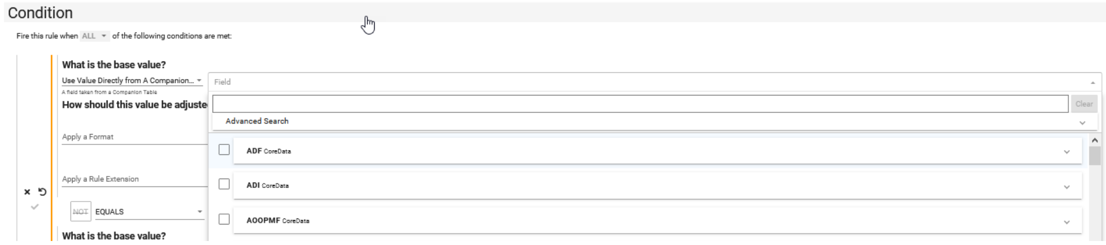
Base



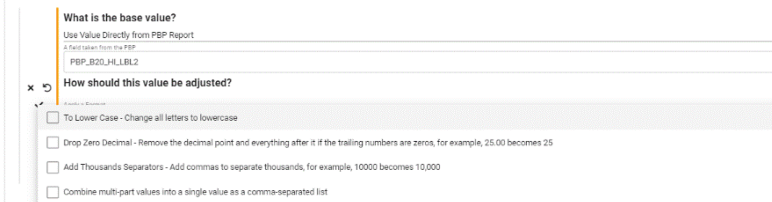
   a. If "Type in a Value," enter a new value
   b. If "Use Value Directly from PBP Report," select a Header Name from the dropdown list



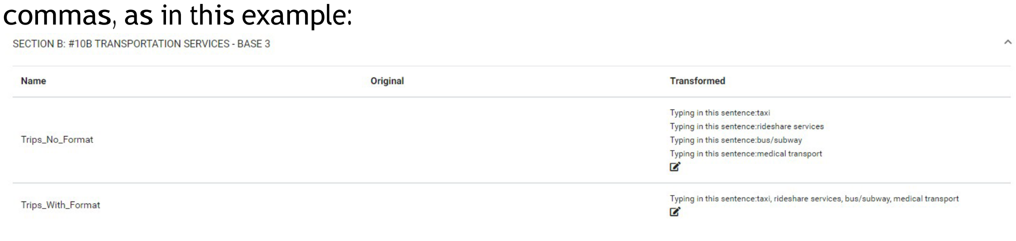
c. If “Use Value Directly from Companion Table,” select a value from the dropdown list:



5. Indicate how the value should be adjusted:
   a. Optionally **Apply a Format** to add one or more formatting transformations:

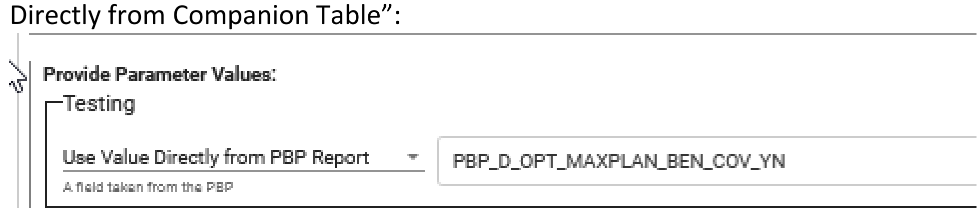


- To Lower Case – Change all letters to lowercase
- Drop Zero Decimal – Remove the decimal point and everything after it if the trailing numbers are zeros, for example, 25.00 becomes 25
- Add Thousands Separators – Add commas to separate thousands, for example, 10000 becomes 10,000
- Combine multi-part values into a single value as a comma-separated list. Instead of creating separate values, this option puts them into a list with commas, as in this example:


SECTION B: #10B TRANSPORTATION SERVICES - BASE 3

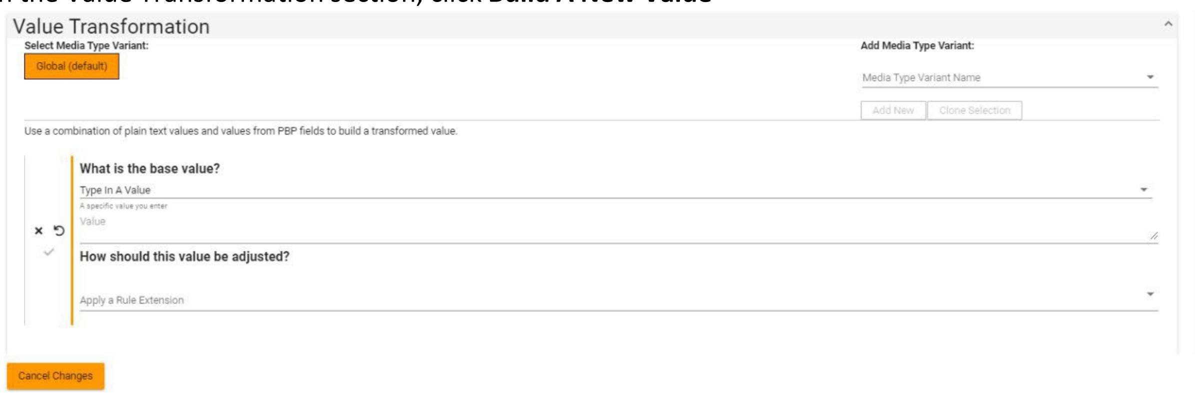
Name	Original	Transformed
Trips_No_Format		Typing in this sentence:taxi Typing in this sentence:rideshare services Typing in this sentence:bus/subway Typing in this sentence:medical transport
Trips_With_Format		Typing in this sentence:taxi, rideshare services, bus/subway, medical transport

   b. Optionally select a **Rule Extension** from the dropdown list. See *Rule Extensions* for a definition and for how to create and edit these extensions.
      i. If using a rule extension, you can change the value here. Select one of the same three choices as when entering the base value for the condition: “Type in a Value,” “Use Value Directly from PBP Report,” or “Use Value Directly from Companion Table”:



6. In the center, Set the conditional  toggle to NOT or ~~NOT~~
7. Select a value for the condition from the four possible values:
   - EQUALS
   - CONTAINS
   - IS NULL (completely absent)
   - IS EMPTY (no actual value).

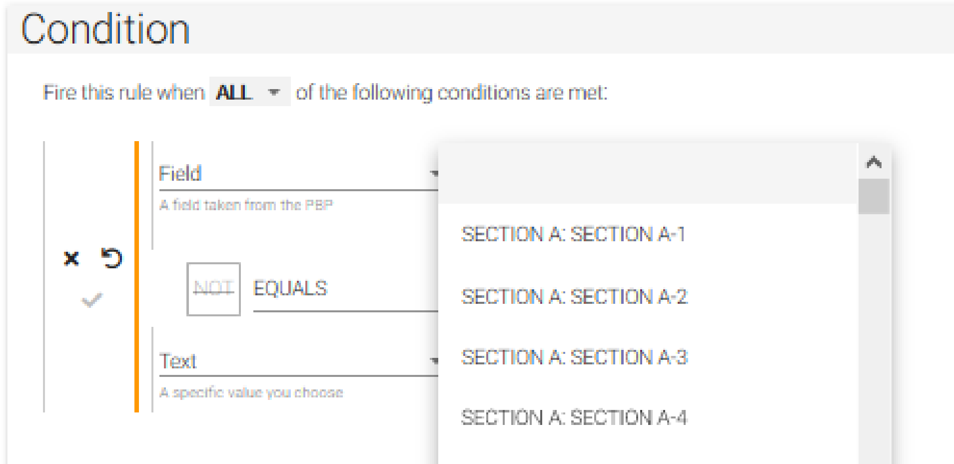
8. Click the checkmark to confirm your entry and save your changes. You can also delete the entry by clicking the “X” or revert to a previous value by clicking the reverse arrow
9. Make the same choices for Base Value, Format, and Adjustment on the right side of the expression. Your condition expression now reads:
   “Fire this rule when ANY/ALL of the conditions are met when the Value on the left (from a PBP Report, a Companion Table, or typed in manually, with Format or Rule Extension changes applied) DOES/DOES NOT EQUAL/CONTAIN/IS NULL/IS EMPTY the Value on the right (from a PBP Report, a Companion Table, or typed in manually, with Format or Rule Extension changes applied).”
10. Click **Cancel Changes** at any time to cancel any updates you have made
11. In the Value Transformation section, click **Build A New Value**



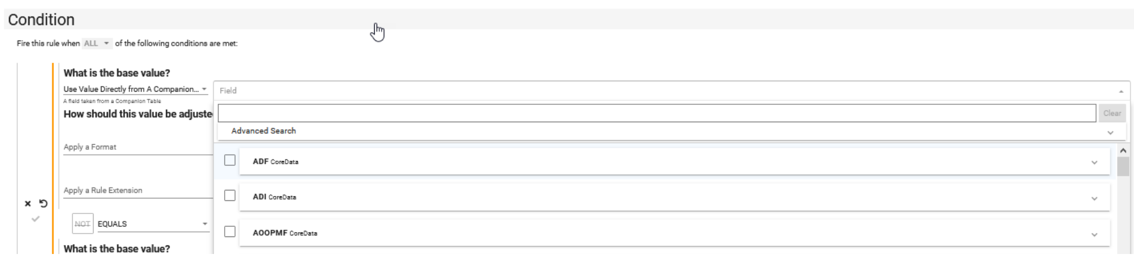
12. If you want to specify this transformation to be for a specific media type, select a **media type variant** from the dropdown list.
13. Click **Add New**.
14. Optionally, select additional media type variants from the dropdown list and click **Add New** after each one. If you set up at least one other variant, the orange “Global (default)” indicator switches to "All Others (default)" and if all variants are deleted it switches back to "Global (default)".
15. Optionally, click **Clone Selected** to copy the currently selected Media Type (either Global (default) for all media types or a specific media type you have selected) and any transformation values you have built (base value, format, rule extension,) to the new media type you select from the dropdown list.
16. Select whether to enter text to use in the condition, or to use a field from the PBP or from a Companion Data table:

   d. If “Type in a Value,” enter a new value

e. If "Use Value Directly from PBP Report," select a Header Name from the dropdown list

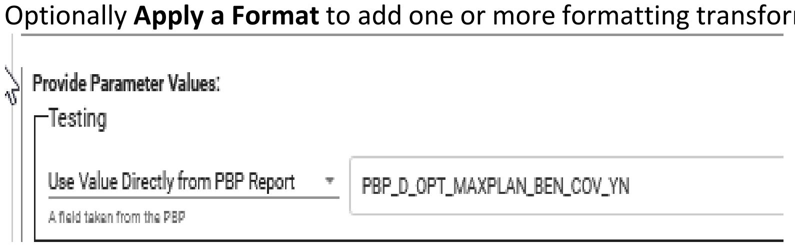


f. If "Use Value Directly from Companion Table," select a value from the dropdown list

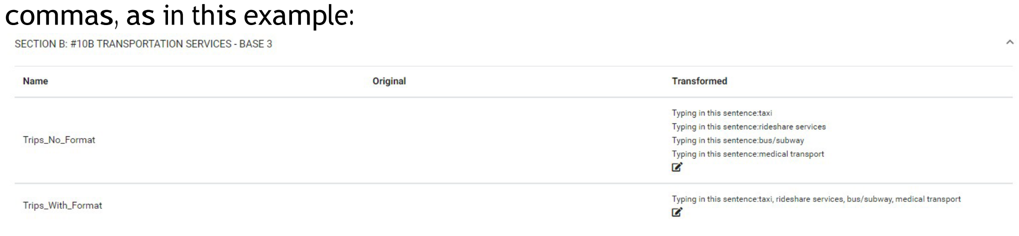


17. Indicate how the value should be adjusted:

a. Optionally **Apply a Format** to add one or more formatting transformations:

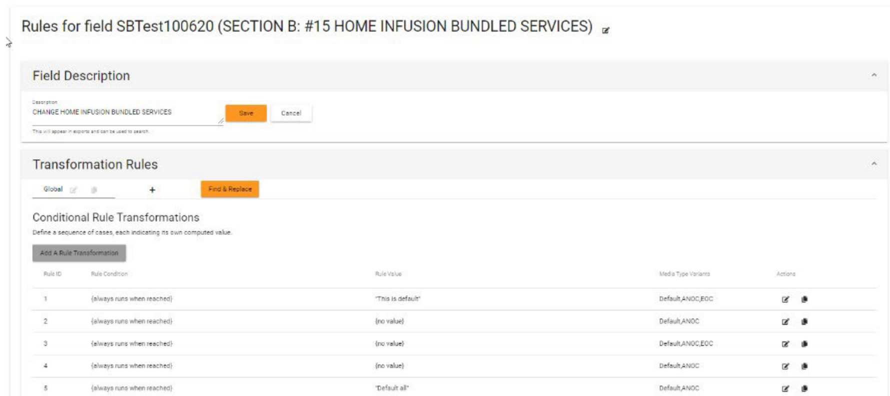


- To Lower Case – Change all letters to lowercase
- Drop Zero Decimal – Remove the decimal point and everything after it if the trailing numbers are zeros, for example, 25.00 becomes 25
- Add Thousands Separators – Add commas to separate thousands, for example, 10000 becomes 10,000
- Combine multi-part values into a single value as a comma-separated list. Instead of creating separate values, this option puts them into a list with commas, as in this example:



b. Optionally select a **Rule Extension** from the dropdown list. See *Rule Extensions* for a definition and for how to create and edit these extensions.
   i. If using a rule extension, you can change the parameter value here. Select one of the same three choices as when entering the base value for the condition: “Type in a Value,” “Use Value Directly from PBP Report,” or “Use Value Directly from Companion Table”:

18. Click the checkmark to confirm your entry and save your changes.
19. Click **Cancel Changes** at any time to cancel any updates you have made
20. You can also delete the entry by clicking the “X” or revert to a previous value by clicking the reverse arrow.
21. After you have saved all your conditions and value transformations with the checkmarks, the Cancel Changes button changes to the Close button. Click **Close** to return to the updated screen for your field.



NOTE: The Media Type Variants chosen for this transformation are listed in a column.

   a. Click the edit icon to edit the transformation.
   b. Click the duplicate icon to make a copy of your transformation that you might edit to create a different transformation

21. Click **Remove or Reorder** to change your transformation order or remove a transformation.

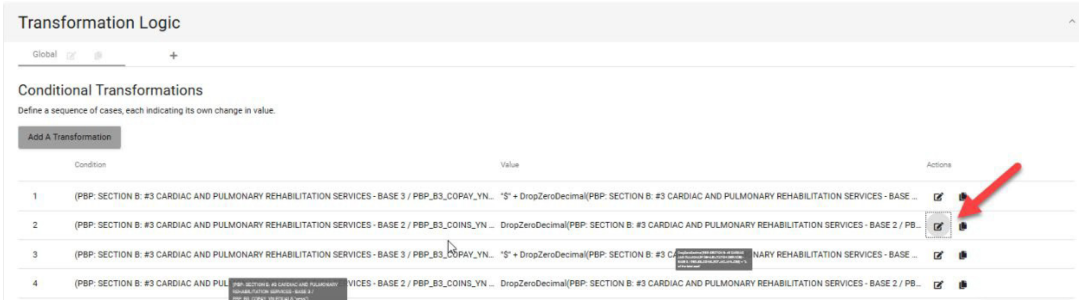
   a. If you have multiple transformations, click the up and down arrows to move them in the hierarchy order. The order is important. Rules will stop processing at the first row that validates as true for the conditions and transformations contained in it.
   b. Click the red arrow with the “X” to remove a transformation.

When you are satisfied with your rule, click Save. The rule is added to the list of rules in Custom Field Names.

22. Click the up or down arrow to move the transformation in order of hierarchy. Conditions higher in the list are triggered in order before ones lower in the list.

NOTE: The transformations are numbered on the left. When your complete your changes and click **Close**, the numbers reorder to the new numeric sequence.

ALSO NOTE: If you have a series of conditions, to help you keep track of which condition you are working on the program highlights your last action with a grey circle, whether it was an edit or a clone of the condition, as in this example:

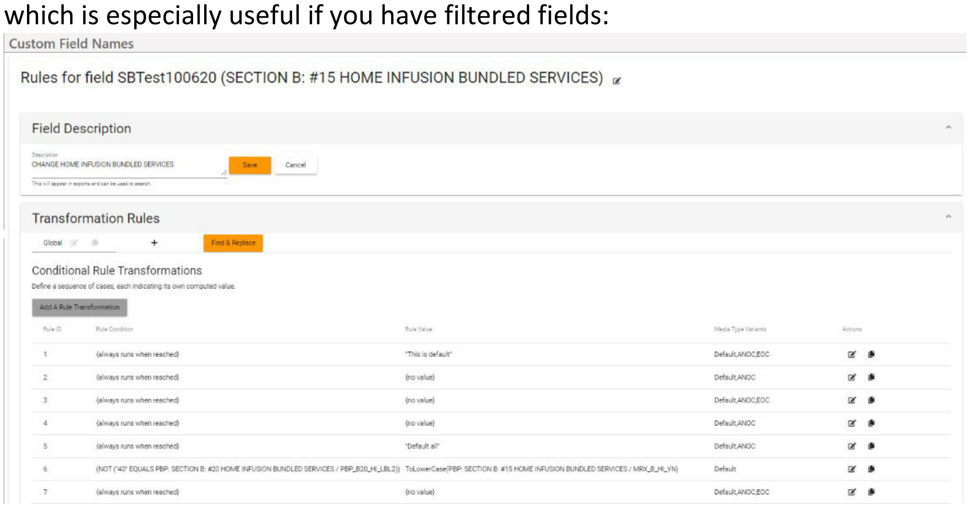


You can use the grey circle as a navigation aid if you are editing several conditions. If you have changed the order of your conditional transformations, the numbers reorder to the new numeric sequence.

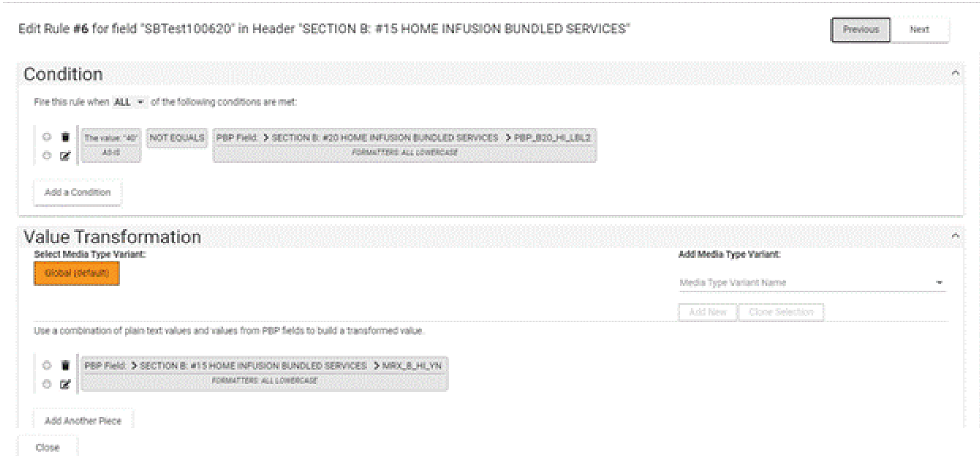
Edit Transformation Field

To edit a transformation field:

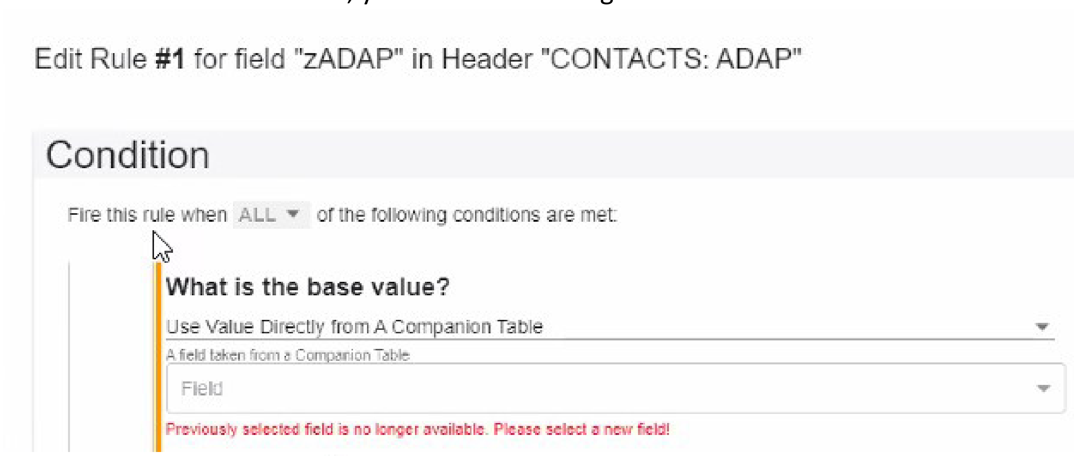
1. Click the edit icon on the row for any field that already has a rule written for it. The rule for that row's transformation displays in a new tab that preserves your original field list, which is especially useful if you have filtered fields:



2. Follow the same editing steps as when creating a new rule. See *Custom Field Names*.
3. Click the edit icon on a rule in the list of Rule Transformations to further edit any transformation. The Edit Transformation screen displays:



a. Click the edit icon to the left of any condition or transformation to edit it. **NOTE**: If you try to edit a transformation that is using a value from a companion table that has been removed, you receive a message:



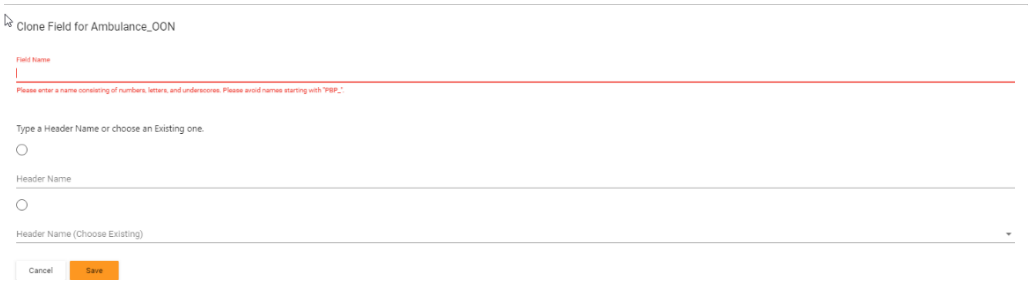
b. Click the wastebasket icon to delete the condition or transformation.
c. If you have more than one condition or transformation, click the up or down arrows to change the order in the list
d. Click the checkmark to save your changes

2. Click **Cancel Changes** at any time to cancel any updates you have made to the conditional transformation for this rule.
3. After you have saved all your condition and value transformation changes with the checkmarks, the Cancel Changes button changes to the Close button.
   a. Click **Close** to return to the updated screen for that field
   OR
   b. Click **Previous** or **Next** to edit the previous or next rule in the list. The header for the page gives the rule number you are working on currently.
   NOTE: The **Previous** and **Next** buttons are greyed out while you are editing a condition or transformation

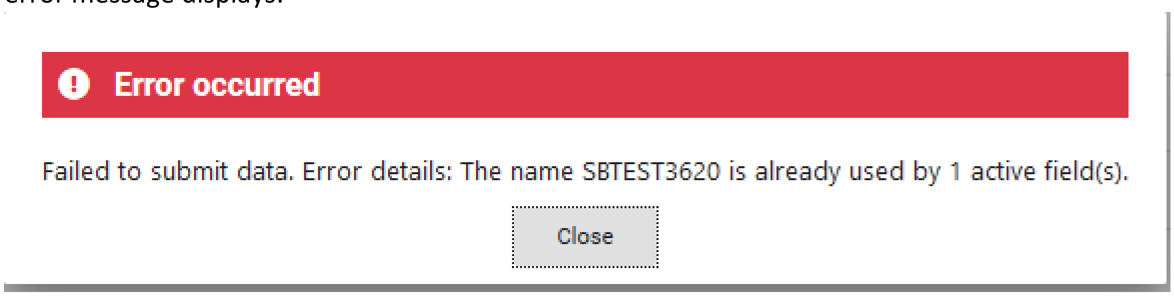
Clone Field

You can clone a field to apply on another field.

1. Click the Clone icon to clone a field. The Clone Field dialog displays:



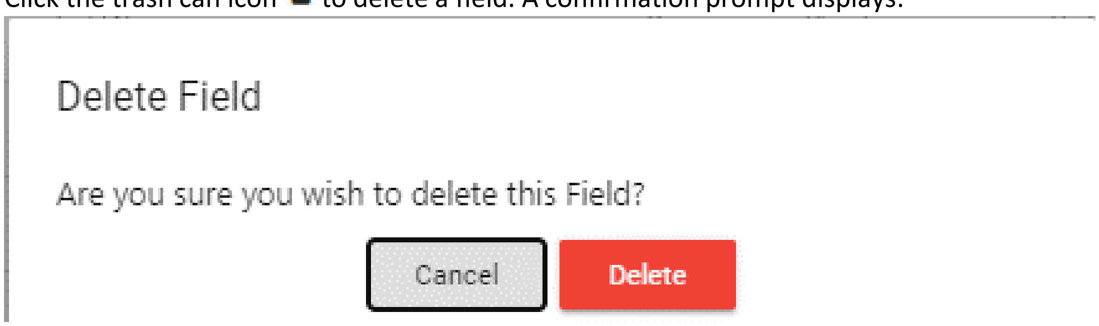
2. Enter a **Field Name**
3. Select the appropriate radio button to enter a new **Header Name** or select from the dropdown list of existing Header Names
4. Click **Save.** The Edit Rule screen displays.
   NOTE: Field names must be unique. If you try to save a new field that exists already, an error message displays:



5. Follow the steps for editing a field. See *Edit Transformation Field.*

Delete Field

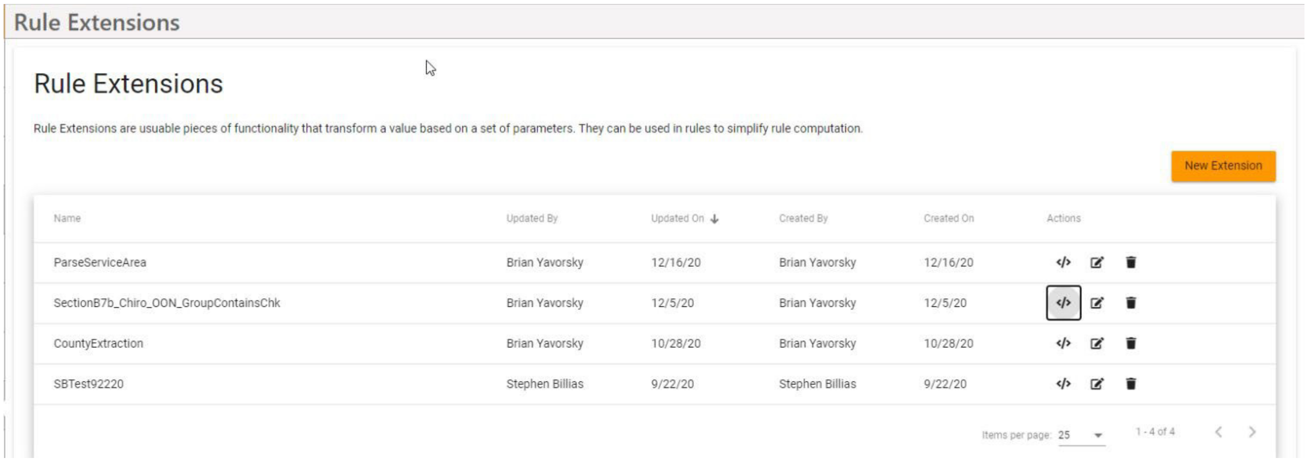
1. Click the trash can icon to delete a field. A confirmation prompt displays:



2. Click **Delete**. The field is removed from the list.

Rule Extensions

Rule Extensions offer the ability to create multistep functions to apply as formatting on transformation rules. You can bundle several formatting steps into a single extension.



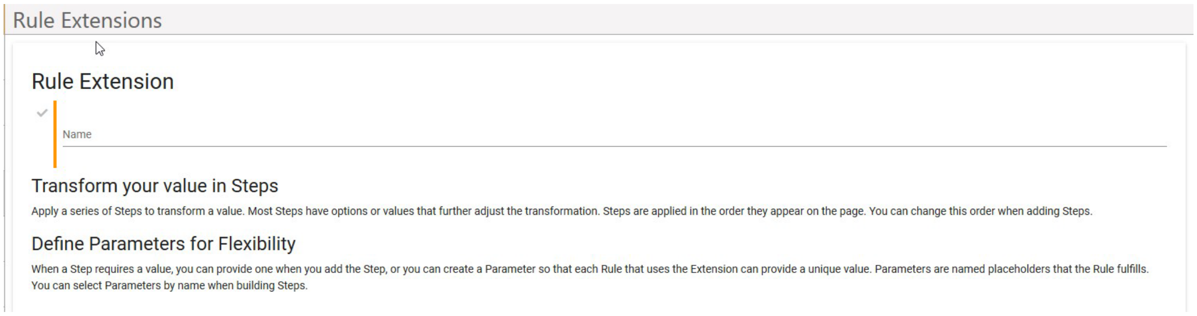
The CodySoft PBP Module comes with nine extensions installed:

- **To Lower Case**—changes either any or all uppercase values to lower case
- **Join Multi Part Value**—to join multipart values into a list with commas or other separators for use in a text sentence
- **Grammatically Join Multi Part Value**— to join multipart values into a grammatically correct list using conjunctions like “or” or “and” for use in in a text sentence
- **Value Contains Check**—to search for a value using search features like whole word and case sensitivity. The check returns a “Yes” or “No” value that determines how a rule is processed. For example, IF PBP VALUE CONTAINS (“6”) = “Yes”, then process accordingly.
- **Perform Arithmetic**—to perform simple arithmetic functions on a value from a PBP report or from one PBP report value to another
- **Split Value Into Parts**—to split a single value into several values separated by a delimiter like a semicolon (;)
- **Trim Characters from Values**— to remove embedded characters like a dollar sign ($) from a value, before or after the value or anywhere. You can specify whether to match whole word, partial match, or any match, and you when you create the extension you can specify a value or select to choose a parameter when you build the rule.
- **Translate Master Pick List Keys**—Some CMS PBP Report XML values are passed through as indices like 1,2,3,4,5,6. The CMS PBP tool has Access Database values where these indices are mapped to corresponding text like Cardio, SNF, and so forth. If the MDB database is uploaded to Schema tab, use this function to do a lookup of the indices to the text.
- **Replace Text from Values**—To identify and replace text to update values being passed through during transformation. You add the rule extension to fields that need text changes after they come in from the PBP Reports.

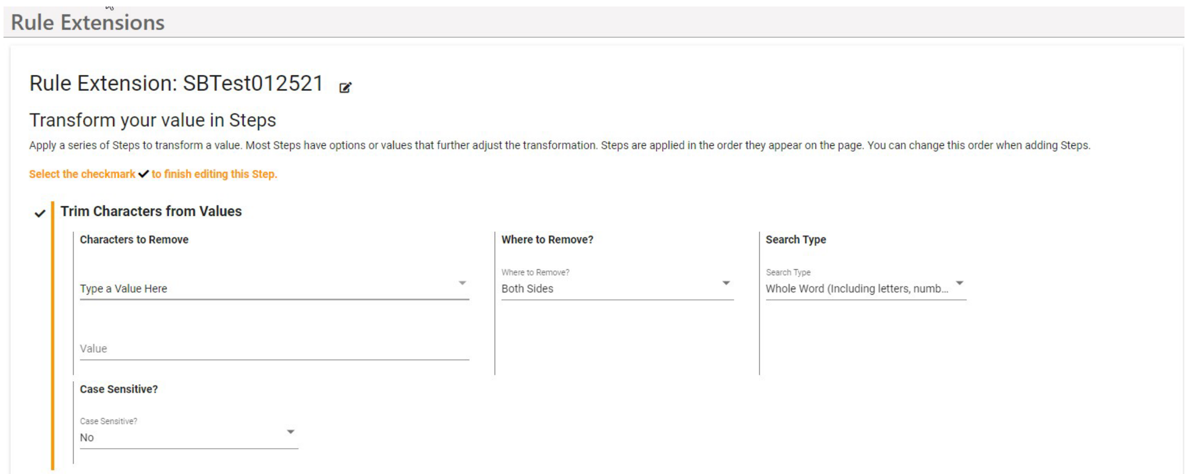
You can create additional custom rule extensions using the supplied extensions as steps in the new extension and changing the values as needed.

New Extension

1. **Click Admin/Rule Extensions**
2. Click **New Extension** to create a new set of transformation formatting steps. The Edit Extension screen displays:



3. Enter a **Name** for the extension
4. Click the checkmark ✔ to create the named extension
5. Select a rule extension step from the dropdown list of available steps:
6. Click **Add**
7. Edit the step. Each step has unique options or values. For example, **Trim Characters from Values** has these choices:

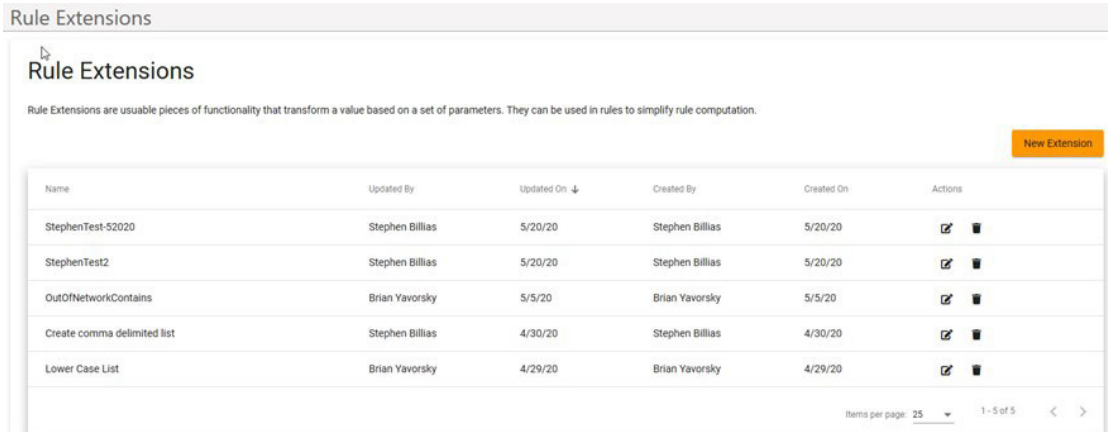


   a. Select **Type a Value Here** to enter a value
      or
   b. Select **Choose a Value When Building Rule** to select a previously defined Parameter when creating or editing a field
   c. Select where to remove the character(s), either before, after or on both sides of the specified value
   d. Select whether to search for a whole word, partial match, or any match on the value you specify

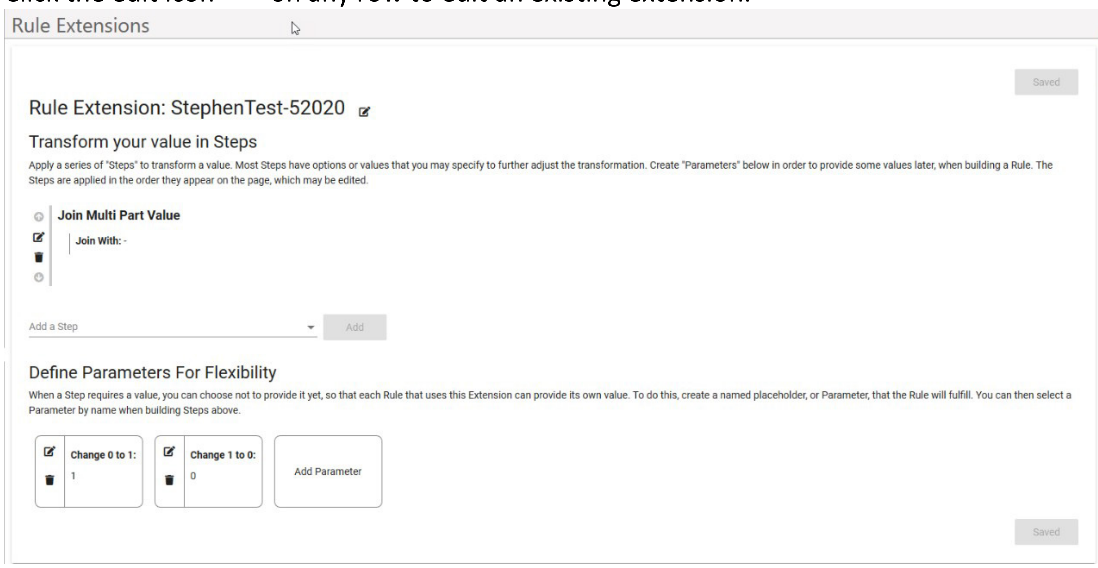
8. When you have made your selections for the step, click the checkmark ✔ to finish editing the step
9. Add more steps if necessary
10. Click **Add Parameter** to create a new Parameter
11. Enter a **Parameter Name**
12. Enter a **Default Value** for the parameter.
13. When you have made your selections for the parameter, click the checkmark ✔ to finish editing the parameter
14. Click **Save**. The new extension is added to the list

Edit Extension

1. Click **Admin/Rule Extensions**. The Rule Extensions screen displays, with the list of already created extensions:



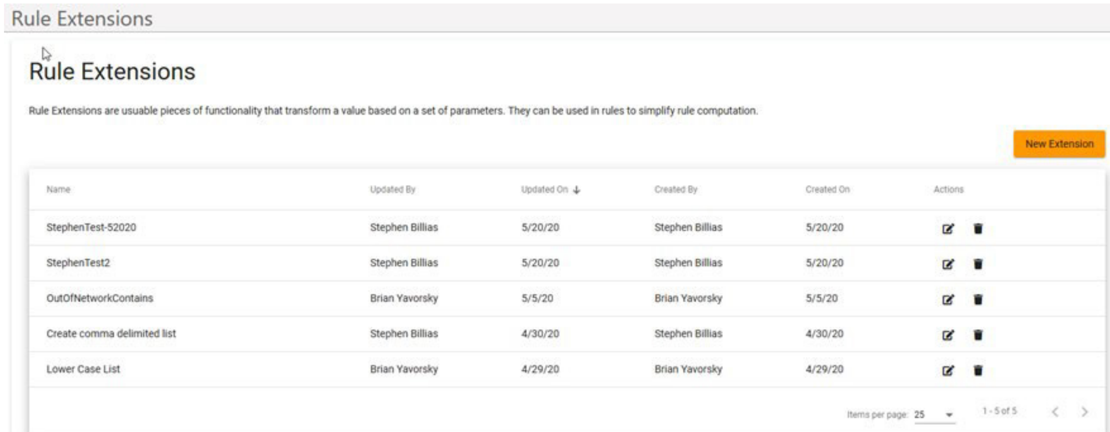
2. Click the edit icon on any row to edit an existing extension.



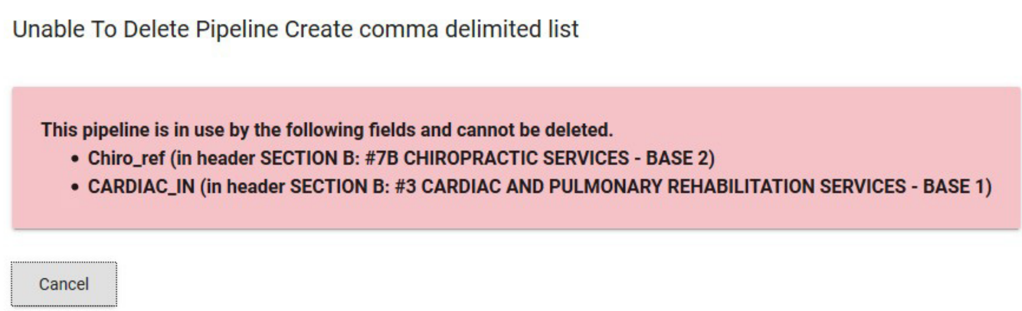
3. Click the edit icon to edit the **Name** if necessary
4. Click the edit icon to edit any step.
5. Click **Add** to another extension step
   a. If there are multiple steps, use the up and down arrows to reorder in the list
   b. Click the trash can icon to delete a step
6. Add or edit Parameters as necessary.
7. Click **Save**.

Delete Extension

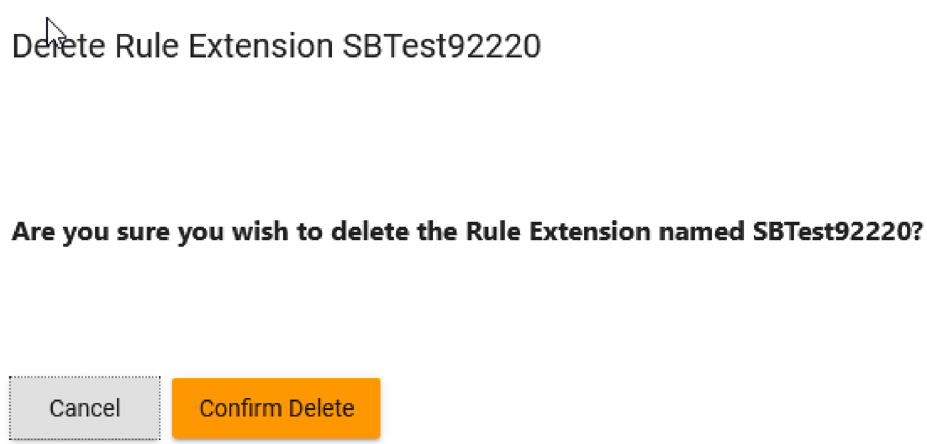
1. Click **Admin/Rule Extensions**. The Rule Extensions screen displays, with the list of already created extensions:



2. Click the trash can icon to delete an existing extension.
   a. If the extension is in use, an error message displays, showing where the extension is in use:



   b. Click **Cancel** to continue
   c. If the extension is not used in any transformations, a confirmation message displays:



   d. Click **Confirm Delete** to delete the extension from the list

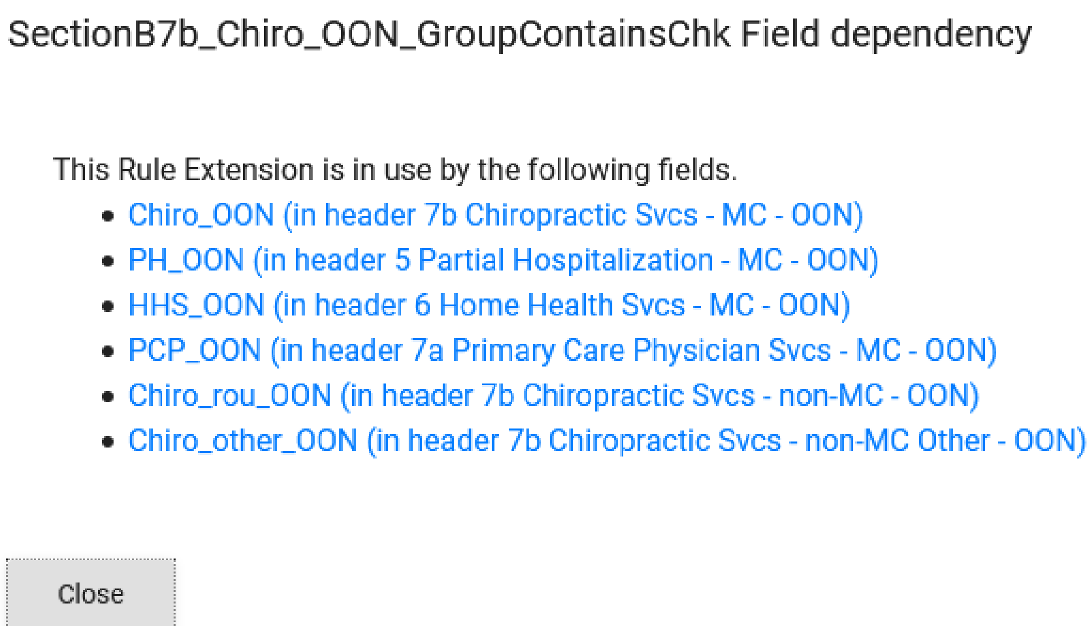
Display Custom Field Names That Use Extension

You can view a list of fields that are using a Rule Extension.

1. Click Admin/Rule Extensions. The Rule Extensions screen displays, with the list of already created extensions.

2. Click the View Fields icon </> . A processing message displays, for example:

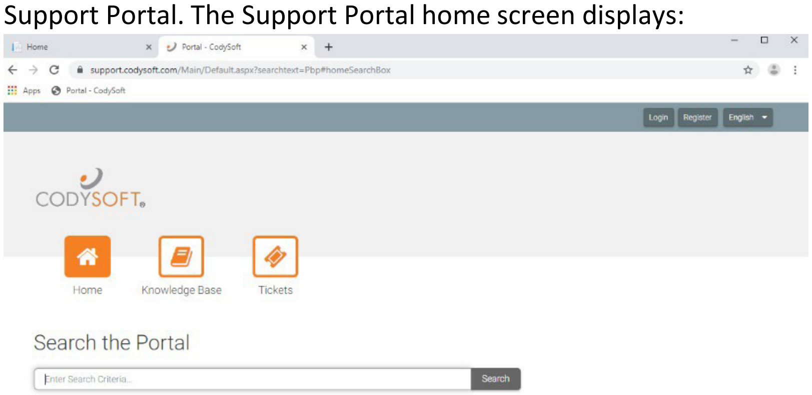
When processing is completed, the module displays the list of fields that are using the rule Extension:



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 three choices:
   a. Knowledge Base
   b. Tickets

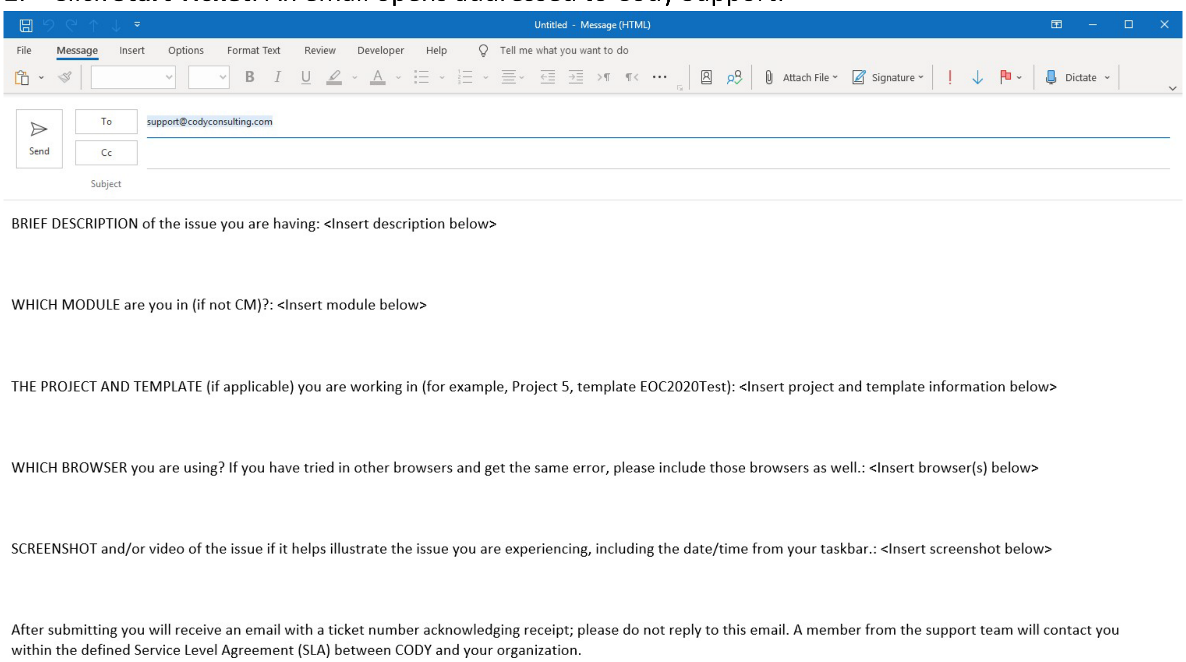
c. Search the Portal

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 provides links to user guide documents on many CODY modules, including a set of videos on how to accomplish basic CodySoft Collateral Management (CM) tasks

Open a Ticket

1. Click **Tickets** to enter a new support ticket:
2. Click **Start Ticket**. An email opens addressed to Cody Support:



3. Fill out the email, providing as much information as possible for each requested item:
   a. Description
   b. Module
   c. Project/Template
   d. Browser
   e. Attached screenshot or video

4. Click **Send.** After you submit the email you will receive an email with a ticket number acknowledging receipt; please do not reply to this email. A member from the support team will contact you within the defined Service Level Agreement (SLA) between CODY and your organization.

Search the Portal

You can search the Support portal, including the Knowledge Base for information.

1. Enter search criteria, for example "PBP."
2. Click **Search**. Any items related to your search appear below the Search bar, with live links to the information.