



User Guide

For use with application release May 23rd, 2022

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CodySoft[®]'s Collateral Management Module[®] is an easy-to-use, single-source solution for marketing materials creation, from project inception through inventory management. The module incorporates project management, document creation, compliance tracking, inventory management, production staging, reporting tools and assets management all in one system. Use this guide to navigate the Collateral Management Module[®]. This guide provides you with step-bystep instructions for common module activities. If you have questions, please contact your CodySoft[®] administrator.

Accessibility

server@codysoft.net To:

Confirm your access to CodySoft

Please follow the instructions below to confirm your new account with CodySoft within 7 days to avoid account deactivation.

CodySoft Username:

Please click here to confirm your email address

Thanks!

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.

\leftrightarrow > C $rac{1}{2}$	🛛 🛔 🗝 https://ogin.codysoft.ret/users/confirmPasswordReset?token=CIDJBHzjBKAXuBBu1he0b0lQ4tUvR1RvUvUctorbCaQV%2F6PFSeZVzi4O6XphAkktVM7Ug]HduGAV%2F9Fhu3MHB64eMa1d%2? 🚥 🗑 🏠	III\ 🗉 📽 ≣
CODYSOFT. shill	liss@rcodyconsulting.com *	
	Reset Password	
	New Password Confirm Password	
	Password must be at least 8 characters in length	
	Password must match at least 3 of 4 criteria listed below:	
	Contain 1 upper case character	
	Contain 1 lower case character Contain 1 numeric character	
	Contain 1 special character	
	New Password and Confirm Password must match	
	Submit	

- 2. In the New Password field, enter a **new password.** Follow the instructions for meeting the password requirement.
- 3. In the Confirm Password field, enter the **new password** again.
- 4. Click Submit. The login screen displays.
- 5. Enter your user name

- 6. Enter the password you just created
- 7. Click Sign in. You are logged in to the main dashboard of CodySoft.

NOTE: If your company uses Single Sign On (SSO) then you will not be asked to create a CodySoft password when you log in for the first time.

Dashboard

The dashboard is the first screen you see after you log onto the Collateral Management Module[®]. It provides you with at-a-glance views and convenient access to your projects, tasks, discussions and compliance submissions.

¢	F								Welcome Cory Belden Admin Help Logoff
Collater	alManagem	ent odule®							Search Projects
Home	Projects	Rules	Library	Inventory	Reports	Archives	Search Regulatory Rules	Admin	

Dashboard

My Projects Tasks My Discussions Submissions Approvals							
My Projects New Project							
Showing 1 to 10 of 15 entries							
Job # 💠	Project Title \$	Media Type	Status \$	Due Date 💠	Created By \$	Created On \$	# Tasks
			v				
<u>153</u>	CY23 MAPD HMO ANOC	ANOC	InProgress	5/31/2022	Al Valenti	4/7/2022	6/8
<u>149</u>	Exhibit 4e: Model Notice of Enrollme	Letter	InProgress	3/16/2022	Al Valenti	3/2/2022	2/4
<u>147</u>	CY22 MAPD HMO Individual SB	SB	InProgress	2/24/2022	Al Valenti	2/10/2022	2/4
<u>146</u>	CY22 MAPD HMO EOC	EOC	InProgress	2/28/2022	Al Valenti	1/31/2022	5/8
<u>144</u>	PY22 Large Group SBC	SB	InProgress	12/30/2021	Al Valenti	12/2/2021	1/3
<u>140</u>	CY22 DSNP EOC	EOC	InProgress	12/31/2021	Cory Belden	11/3/2021	1/3
<u>134</u>	CY22 DSNP ANOC	ANOC	InProgress	9/30/2021	Al Valenti	9/20/2021	2/4
<u>133</u>	PY2022 Marketplace EOC	EOC	Approved	10/29/2021	Al Valenti	9/20/2021	0/0
<u>109</u>	PY2021 MAPD_ANOC	ANOC	InProgress	8/31/2020	Cory Belden	7/30/2020	1/3

Your view is customizable and is unique to your access role. You can filter on any column. Hover over pop-ups appear on any field on the Dashboard also.

There are five tabs on the Dashboard:

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

Tasks—displays the list of all tasks assigned to you. See Tasks and Traffic Management

My Discussions — displays the list of all active discussions that you are a part of. See Discussions

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

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

- Assets
- Templates
- Versions

Dashboard

Asset Approvals					
Showing 1 to 4 of 4 entries					
Asset Name	\$	Created By	Ó	Created On	
BTEST441218 Stephen Billias				4/12/2018	
TestCreateAsset41118-1		Stephen Billias		4/11/2018	
SBTest41218		Stephen Billias		4/12/2018	
Sample CY17 HMO Rules Grid	11-9-16	Stephen Billias		11/8/2016	
Template Approvals					
Showing 1 to 3 of 3 entries					
Job Number 🔷	Project Title	0	Created By	0	Created On
lob Number 0	Project Title	•	Created By	0	Created On
]	Project Title Stephentest2	°	Created By Stephen Billia		Created On 4/3/2018
412		•		s	
412 423	Stephentest2	•	Stephen Billia	s nti	4/3/2018
412 423 423 5how 10 ♥ entries	Stephentest2 adasd		Stephen Billia Alphonse Vale	s nti	4/3/2018 4/13/2018
412 423 423 Show 10 V entries Version Approvals	Stephentest2 adasd		Stephen Billia Alphonse Vale	s nti	4/3/2018 4/13/2018 4/13/2018
412 423 423 thow 10 V entries Version Approvals	Stephentest2 adasd sdfsdfsdf		Stephen Billia Alphonse Vale	s Inti Inti	4/3/2018 4/13/2018 4/13/2018 Previous 1 Ne
412 423 423 Show 10 V entries Version Approvals Showing 0 to 0 of 0 entries	Stephentest2 adasd		Stephen Billia Alphonse Vale	s Inti Inti	4/3/2018 4/13/2018 4/13/2018

Smart Search

Fields in CodySoft are sorted in alpha order. If a field is a dropdown field with multiple choices, you can use the Smart Search feature to narrow your choices. Enter a few letters in the Filter field at the top of a dropdown list to narrow the list. For example, in the Line of Business (LOB) field on the Project Details screen:

Line Of Business *	1 selected	
MA, MAPD	Filter: Enter keywords ✓ Check all X Uncheck all	
Plan Types *	Commercial	
Sub Plan Types	□KD LOB ☑ Medicare	
Medicare Advantage Gold - H Advantage Basic - H1234 - 00 Advantage Select - H1234 - 2	Medicare South Florida	- H1234 - 002, Medicare Advantage Silver - H1234 - 003, Medicare H1234 - 011, Medicare Advantage Bronze - H1234 - 100, Medicare 900, Medicare - Ravent Test 2 - H1234 - 901, Medicare Raven Test

if you enter "med," the list returns just those LOBs:

Line Of Business *	1 selected]
MA, MAPD	Filter: med ✓ Check all X Uncheck all	
Plan Types *	Medicare	
Sub Plan Types	Medicare Advantage	
Medicare Advantage Gold - H Advantage Basic - H1234 - 00 Advantage Select - H1234 - 2		- - H1234 - 002, Medicare Advantage Silver - H1234 - 003, Medicare H1234 - 011, Medicare Advantage Bronze - H1234 - 100, Medicare 900, Medicare - Ravent Test 2 - H1234 - 901, Medicare Raven Test

Notifications

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

	1							Welcome Cory I Admin <u>Help L</u>	
					[Messages			
ollateralM	anagement					admin@codysoft.cor Subject: Version C	n reation Summary	- 153 - CY23 MAPD Date	HMO ANOC e: 4/20/2022
Home P	module® Projects Rules Library Inven	tory	Reports Ar	chives S	Search Regula	admin@codysoft.com Subject: Template ANOC (Cory Belde	Review Complete		IAPD HMO e: 4/20/2022
						admin@codysoft.com Subject: Template ANOC (Amy Dubay	Review Complete		IAPD HMO e: 4/20/2022
shboai	rd					admin@codysoft.com Subject: Template ANOC (Al Valenti)	n Review Complete		IAPD HMO e: 4/20/2022
My Project	ts Tasks My Discussions	S	ubmissions	Approvals	5	View all			
My Proje	ects							Ne	<u>w Project</u>
Showing 1	1 to 10 of 15 entries								
Job # 💲	Project Title	¢	Media Type		Status 🗘	Due Date 🗘	Created By \$	Created On \$	# Tasks
					v				
<u>153</u>	CY23 MAPD HMO ANOC		ANOC		InProgress	5/31/2022	Al Valenti	4/7/2022	6/8
<u>149</u>	Exhibit 4e: Model Notice of Enro	ollme	Letter		InProgress	3/16/2022	Al Valenti	3/2/2022	2/4
147	CY22 MAPD HMO Individual SB		SB		InProgress	2/24/2022	Al Valenti	2/10/2022	2/4
146	CY22 MAPD HMO EOC		EOC		InProgress	2/28/2022	Al Valenti	1/31/2022	5/8
144	PY22 Large Group SBC		SB		InProgress	12/30/2021	Al Valenti	12/2/2021	1/3

Notification Message Center (Quick View)

Click the envelope icon in to open the Messages window. The Messages window displays your five most-recent notification messages. To see more messages, click **View All**. The Message Center opens:

essages					Messages - Crea	ate Me
Jnarchived Archived						
narchived						
Search:	Read:		Sort by:			
	All	~	Subject			
Mark All Read Mark Read Mark Un	Archive All Archive From "A" to "Z"					
Message				DateCreated	From	
Subject:Version Creation Summary - The following versions were crea	153 - CY23 MAPD HMO ANOC ted for this project: Project Details: Project #: 153 Project Name: C	Y23 MAPD HMO ANOC Template	e # / Name: 1 /	Date: 04/20/2022	admin@codysoft.co	m
Subject: Template Review Completed	for 153 - CY23 MAPD HMO ANOC (Cory Belden)					
The following review Template Re	eview - CY22 MAPD HMO ANOC has been completed for Template	e: Project Details: Project #: 153 F	Project Name:	Date: 04/20/2022	admin@codysoft.co	m
Subject: Template Review Completed	for 153 - CY23 MAPD HMO ANOC (Amy Dubay)					
The following review Template Re	eview - CY22 MAPD HMO ANOC has been completed for Template	e: Project Details: Project #: 153 F	Project Name:	Date: 04/20/2022	admin@codysoft.co	m
Subject. Template Review Completed	l for 153 - CY23 MAPD HMO ANOC (Al Valenti)					
The following review Template Re	eview - CY22 MAPD HMO ANOC has been completed for Template	e: Project Details: Project #: 153 F	Project Name:	Date: 04/20/2022	admin@codysoft.co	m
Subject:You may begin 7 - Template F	Review Task - Please review ANOC for Stride Basic (Markup Tool) for 153 -	CY23 MAPD HMO ANOC				
The following task has been assi	gned to you (see below) and you may begin now. Request Details:	Project #: 153 Project Name: CV		Date: 04/20/2022	admin@codysoft.co	m

From this view, you can locate messages by date or subject. You can also archive your messages and view old messages.

If you are not receiving CodySoft® emails

- 1. Check to see if your system is redirecting the emails to your bulk/junk email folder.
- 2. If the emails are in your bulk/junk email folder, right-click one of the emails to display the drop-down list. Select **Junk > Never Block Sender's Domain (@example.com)**.

Redirecting your incoming notification emails

- 1. In Outlook, create a folder to store your incoming CodySoft[®] notification emails.
 - a. Right-click your Inbox folder
 - b. Select New Folder.
 - c. Name this folder for example "CodySoft."
 - d. Click OK.
- 2. To create a rule that redirects your incoming notification emails to this folder:
 - Access Manage Rules & Alerts in Outlook. (Outlook 2003/2007 users: Tools > Rules & Alerts; Outlook 2010 users: File > Info > Manage Rules & Alerts). The Rules & Alerts window appears.
 - b. Click New Rule
 - c. In Step 1: Select a template. Select Start from a blank rule Apply rule on messages I receive.
 - d. Click Next.

- e. In Step 1: Select condition(s): Select the **from people or public group** check box.
- f. Select with specific words in the subject or body
- g. In Step 2: Edit the rule description. Click people or public group.
- h. In the From box, type <u>admin@codysoft.com</u>.
- i. Click OK.
- j. Click specified words
- k. Specify words or phrases to search for in the subject or body
- I. Click Add
- m. Click **OK**
- n. In *Step 1: Select action(s)*. Select **move it to the specified folder**.
- o. In Step 2: Edit the rule description. Click specified.
- p. Choose the folder you created above.
- q. Click OK.
- r. Click Next. (There are no exceptions for this rule.)
- s. Click Next.
- t. In Step 1: Specify a name for this rule. (Name the rule.)
- u. In Step 2: Setup rule options: Select the Turn on this rule checkbox.
- v. Click Finish.

Selecting a project or task from the dashboard

From the list on your dashboard, click the project job number (or project request number). This brings you to a project record (or project request form).

Customizing your dashboard view

- 1. Click the Show entries dropdown: to view to 10, 25, 50, or 100 entries on the Dashboard
 - to expand your

view to 10, 25, 50, or 100 entries on the Dashboard.

- 2. To sort a column on the Dashboard, click the up or down arrows
- 3. To filter results in a column, type the first letter or letters of the information you are looking for. **Note**: You can also sort by date by using the calendar widget.
- 4. To reorder the tabs on the Dashboard, simply drag and drop the tab into the desired position.

Other Links on the Dashboard

Depending on your level of access, the following links display in the dark gray toolbar on the top of every page in the Collateral Management Module[®].

	F>								Welcome Cory Belden Admin Help Logoff
Collatera	alManagem	ent _{odule} ®							Search Projects
Home	Projects	Rules	Library	Inventory	Reports	Archives	Search Regulatory Rules	Admin	

Links on the Dashboard

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



- a. New Project to create a new Project
- b. **Projects** to display the list of your project
- c. Schedule Templates to see the list of existing schedule templates
- d. New Schedule Template to create a new schedule template
- e. Search Projects to search for a particular project
- 3. **Rules** Takes you to a list of the rules that have been created for use in the CodySoft[®] editor. If you pause the pointer on this link, you can access other Rules links:

Home	Projects	<u>Rules</u>	Library	Inventory	Reports	Archives	Search Regulatory Rules	Admin
New Rule	e Rules	Search	Rules I	Rules Wizard				

- a. New Rule to create a new rule
- b. Rules to see the list of existing rules
- c. Search Rules to search for a particular rule
- d. Rules Wizard to bulk create rules from a Published Data Asset
- 4. Library Takes you to the Collateral Management Module[®] library of digital assets for use in the application. These assets include images, logos, content, data assets and final versions of documents created with the application. If you pause the pointer on this link, you can access other Library links:

Home Projects Rules Library Inventory Reports Archives Search Regulatory Rules Admin Assets Final Versions Document Kits Create Kit Search Legacy Create Legacy

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



- a. View Inventory Records to see the list of existing inventory records
- b. Upload Inventory Records to upload new inventory records
- c. Create Inventory Reorder Level to set a level for reordering inventory
- d. Inventory Reorder Levels to see a list of established inventory reorder levels
- Reports Takes you to a list of standard reports that are available in Web and XLSX formats, along with a link to Custom Reports which allows you to create custom reports using the CodySoft reporting tool, and a Chart Visualizations tab that provides data analytics in graphic formats.
- 7. **Archives** Takes you to a list of archived projects. If you pause the pointer on this link, you can access other Archive links:



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

- a. Projects to see a list of archived projects
- b. Schedule Templates to see a list of archived schedule templates
- c. Rules to see a list of archived rules
- d. Assets to see a list of archived assets
- e. Final Versions to see a list of archived final versions of documents
- f. Legacy to see a list of archived legacy material

Users with the proper roles can Unarchive any archived item also.

8. Search Regulatory Rules – Launches the CodySoft Regulatory Analyzer[®], where you can search and update your regulatory rules database.

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

 Admin – Brings you to the admin page, where admin users can manage many of the elements included on the project details screen, as well as other Collateral Management Module[®] settings:

 Home
 Projects
 Rules
 Library
 Inventory
 Reports
 Archives
 Search Regulatory Rules
 Admin

Admin Dashboard

 Dispositions
 Notifications Settings
 Vendors
 Compliance Types
 Disposition Disapproval Reasons
 Goals
 Project Formats

 Requested Services
 Submission Types
 Tones
 Tenant Settings

NOTE: This link is available only to users with Admin rights.

From the Admin Dashboard you can change the following settings:

- **Dispositions**—View the list of dispositions for a project and add new dispositions
- Notifications Settings—view and change the notifications settings
- Vendors—View the list of vendors and add new vendors
- Compliance Types—View the list of compliance types and add new compliance types
- Disposition Disapproval Reasons—View the list of disposition disapproval reasons and add new disposition disapproval reasons
- **Goals**—View the list of goals and add new goals
- Project Formats—View the list of project formats and add new project formats
- Requested Services—View the list of requested services and add new requested services
- Submission Types—View the list of submission types and add new submission types
- **Tones**—View the list of tones and add new tones
- Tenant Settings—View and change the project settings for when projects and tasks are considered outdate and change the limit on the maximum number of projects that can be displayed in a custom report.

Dispositions	Notific	ations Settings	Vendors	Compliance Types	Disposition Disapproval Reasons	Goals	Project Forma
Requested Ser	rvices	Submission Type	5 Tones	Tenant Settings			
Tenant Set	ttings						
Project	t Setting	IS					🖺 Sav
Project Outdated Pro		15		•			🖺 Sa
	ojects	1 24		•			🖺 Sa

Setting up the Project

Project Requestor

The first step in a CodySoft project is for the project requestor to submit a draft project, which must be approved by the Project Manager or Traffic Manager in charge.

Creating and submitting a draft project

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

Create Project					
					Save
					Save
ame *			Plan Year *		
tart Date *			Request Date *	05/16/2022	
ue Date *			Line Of Business *	Select options	•
escription *			Plan Name/C#/ID *	Select options	*
			Media Type *	Select Media Type	Ŧ
			Plan Types *	Select options	٣
equested Services 🕕 *					
508-Compliance	Copywriting	[Editing/proofreading	E-Fulfillment	
] Layout/Design	Legal SME	(Mail fulfillment	Printing	
Product Development SME	Provider SME	[Regulatory submission	Reprint	
] RFP/RFI	Rx SME	[Ship fulfillment	U Web upload	
Project Overview Project	: Services/Details	Printing and Distri	bution Requestor Info	Attachments	

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

- 2. On the **Create Project** page, enter the following information:
 - a. **Name** Enter a **Name** for the project. Special characters like "\$" and "%" are allowed in project filenames.
 - b. **Plan Year** Enter the plan year covered by the communication.
 - c. Start Date Enter the project start date using the calendar widget
 - d. Due Date Enter a project Due Date using the calendar widget
 - e. Audiences Select your material's audience from the drop-down list.
 - f. Line of Business From the drop-down list, select the checkboxes for the lines of business that apply to this project.

- g. **Departments** Select the appropriate departments from the drop-down list.
- h. **Plan Name/C#/ID** From the drop-down list, select the checkboxes for the **contract numbers** that apply to this project.
- i. Description Enter a brief Description of the project
- j. **Budget Estimate** Enter a preliminary budget number. When the project is complete, come back to this tab and enter the final budget amount in this field
- k. **Request date** This is the date you are submitting your request. It is an autogenerated field.
- I. Media Type From the drop-down list, select the Media Type for this project.
- m. Copy Supplied Select the Yes option if written copy is included in the request (If you select Yes but do not attach any copy in the Attachments tab, you receive a reminder to do so.)
- n. **Plan types** Select the plan types from the drop-down list (for example, *Classic Gold HMO MAPD*).
- o. **Requested Services** Select all requested services required for the creation of your material. Note that you can select Other and enter your own requested service.
- p. Optionally click Add Attachment on the Attachments tab below to attach any relevant documents that apply to this project. For example, if you choose Copy Supplied=Yes you must upload material for the project as an attachment.
- q. If known, select the **Project Manager** on the Project Overview tab below. Select the user responsible for managing the day-to-day details of this collateral material project from the drop-down list. You can do this now or after you save the project. The project must have a project manager to be approved. The Traffic Manager is responsible for selecting the project manager if none is selected here.
- r. Click **Save.** The project is created with an auto-assigned number and placed in Submitted status. See *Project Statuses: Approving and Declining New Projects* for next steps.

You will receive a notification email from CodySoft[®] that your project request has been submitted for review and approval. See *Traffic Management Functions Roles and Responsibilities* for details on how the Traffic Manager or Project Manager handles project requests.

Project Options

After the project is approved, you have several options for continuing work on the project:

Project 397 - Test32718 Approved		
0		
	Copy project Complete In Progress On Hold Exit Sav	re
Details Tasks Discussions Rules Templates	ersions Attachments Compliance Analyze	
Details Tasks Discussions Rules Templates	ersions Acadiments Compliance Anaryze	
Project Overview Project Services/Details Printing a	d Distribution Requestor Info	

Copy project – Click Copy Project to make a duplicate of this project with all fields in the new project the same as in the one you copy. The copy process creates a new project with a new number. Change the project name in the copied project to distinguish it from the original project. **NOTE**: Schedules and Templates do not carry over into the copied project.

Complete – Click Complete to complete the project and move it to the Archives. Any open tasks associated with the project will be removed from the task list. A notification is sent that the project has been archived.

In Progress – Click In Progress to move the project to the state where you can begin to add tasks and perform other project tasks.

On Hold – Click On Hold if you need to pause work on the project but you don't want to cancel it.

Exit – Click Exit to stop editing the project. If you have made changes to the project you will get a message asking if you want to leave the project without saving your changes.

Cancel Project– Click Cancel if you need to end a project before it is completed. Cancelled projects are automatically archived.

NOTE: You can cancel a project only after it has moved to the In Progress state.

Grids

Populating the Data Grid

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

Example:

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

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For each benefit, you enter the value for the previous year and the current year in the appropriate cells. The values are identified as attributes. For example, the attribute IPHA_IN in column C in the preceding figure is the name that you insert as an element in the template to retrieve the data in the cells in the plan columns, based on rules you create and apply to the attribute in the template. Use letters and numbers only in the attribute names—the only special characters allowed are underscores (_) and hyphens or dashes (-). Once you have populated the data grid with values, you upload the data grid to CodySoft and create rules to insert the values in the data grid into your template.

NOTE: If any of your data grid cells contain hyperlinks to URLs, they are merged as live links both in Test the Template and Versioning, in both Word documents and PDF. *See Testing, Approving, Declining, and Cancelling the CodySoft® Template* and *Data-merged Versioning*.

Uploading the Data Grid to the Library

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

Creating a Rules Grid

You can create Rules Grid to manage how your rules are implemented in CodySoft. Here are a few tips for creating a Rules Grid:

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

The rules grid is set up with a list of rules in one column, the plans in columns to the right of the rules, and x's in the plan columns denoting which rules apply to which plans. Because the Rules Grid is an Excel document, you cannot edit it in CodySoft, but you can have it open from a local source and re-upload to CodySoft if you make changes from what is already uploaded in CodySoft. Here's a sample portion of a rules grid:

A	B	С	D	
		PlanName	001(H123	002(
		Variant	2018	2018
		Attribute	Ventura	Los A
		Plan_Name	Plan A	Plan E
Rule description	Location in model	Rule		
if members may receive Extra Help from Medicare to help pay for Medicare Rx drug	ANOC 2.6, 1.4.1, ch 5/6 intro	mayExtraHeIp	x	x
if plan has optional	1.4.1, 4.2.2, ch 12	optsupbens	x	

Rules Grid Format

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

- 1. C1: PlanName
- 2. C2: Variant
- 3. C3: Attribute

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

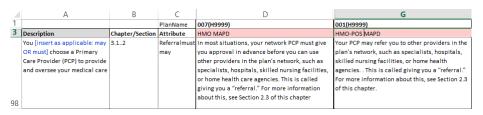
Upload your rules grid as you would the data grid or any other data asset. See Adding a New Asset to the Library

Alternate Grid Options

Populating the Operational Grid

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

Example:



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

Uploading the Operational Grid to Library

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

Creating an Asset Application Grid

When you are creating a template in a CodySoft[®] project, you may create assets that you want to associate with a project. These assets may be Word documents that you want to bring into

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

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

Example:

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

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

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

Uploading the Asset Application Grid to Library

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

Working in the Template

Templates Tab

The Templates tab lists all templates for the project. From the Library menu, select **Templates**. The Templates screen displays:

Collat	eral	Manageme	<mark>nt</mark> Iule⊗						CODY	SOFT _®			Stepher Elp Log (1113) Search	
Home	e	Projects	Rules I	Library	Inventory	Reports	Archives	Search Regula	atory Rules	Admin				
Proje	ect 6	686 - New	MCETest	Project	in Pro	gress								
							Copy pro	oject Car	ncel Project	Complete	On H	old	Exit	Save
Deta	ils	Tasks	Discuss	ions	Rules	Templates	Versions	Reviews	Attachme	ents Complia	ince	Ana	lyze	
Add T	<u>Femp</u>	late												
-	Acti	ve Templa	ites											
	No	N	lame		Туре	Status	Created By	Created On	Updated E	By Last Updated				
	1	NewMCE	TestTempla	ate Cody Edite	ySoft or	Approved	Stephen Billias	03/11/2020	Stephen Bill	ias 07/02/2020	0	~	٩	
	2	NEWMCE	TEMPLATE	2 Cody Edite	ySoft or	<u>Draft</u>	Stephen Billias	03/11/2020	Alphonse Valenti	04/06/2020			٢	+
•	Cano	celled Ten	plates											

We will be performing maintenance on the CodySoft servers every morring at 4 AM ET. On Sundays this maintenance will occur at 1 AM ET. If you are working at that time, please save your work and exit the application. Maintenance will take 10 minutes or less. Thank you.

- **Name** Click the underlined document name to edit the template. See *Viewing and editing a CodySoft Editor Template.*
- **Type** Displays the Type selected when the template was created. See Adding, Viewing, and Editing Templates.
- **Status** Displays the Status of the template:
 - o Draft
 - o Approval Pending
 - Approved
 - o Published

See Testing, Approving, Declining, and Cancelling the CodySoft® Template.

- Created By Displays the name of the person who created the template
- Created On Displays the date the template was created

- **Updated By** Displays the name of the person who last edited the template
- Last Updated Displays the date the template was last edited
- Cancel icon Click the cancel icon ¹⁰
 to cancel the template
- Versions icon Click the versions icon icon icon to make versions from approved templates. See *Working with Versions*.
- **Review icon** Click the review icon ^[D] to send a template for review
- **Plus sign (+) icon** Click the plus sign (+) icon to view previous versions of the template and roll back if necessary. See *Template revisions*.

The Templates tab includes a button for adding a new template. See Adding a New Template.

The tab includes separate sections for Active and Cancelled templates. See Cancelling a Template.

Adding a New Template

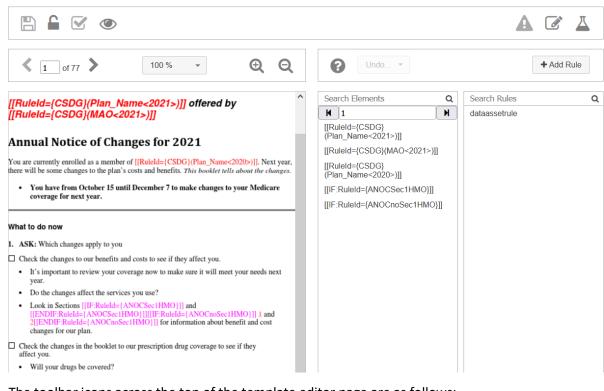
You can add three types of templates to a Collateral Management Module® project:

- File
- CodySoft editor
- Excel

This guide explains how to access each of the three types of templates, edit the templates, and save them to the CodySoft server. See *Adding, Viewing, and Editing Templates*

Viewing and editing a CodySoft Editor Template

1. Click the filename of the template you wish to access. The following screen displays, with the project name and template name in the upper left of the screen:



Project - 109. Template - CY21 MAPD ANOC

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



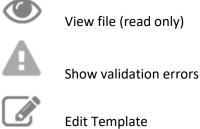
Save template



Unlock Template and Return to Project



Approve Template or Revert status to Draft (note this is not enabled on the template editor screen when there is an open review)



Test the Template

- 2. Click the Edit Template icon.
 - **NOTE:** Once you open the template document, this document is available in Read-Only view only for other users. To unlock this template, save and close the file and click the **Unlock Template and Return to Project** icon.
- 3. Make edits to your documents.
- 4. Click Save.
- 5. Close the file.
- 6. Click the Unlock Template and Return to Project icon

Navigating on the template editor screen

Use the navigation toolbar to move easily through the document:



- o Use the left and right arrows to go forward and backward
- Enter a page number to jump to that page
- Click the magnifying glasses to zoom in or out on the page
- \circ Use the percentage dropdown to change (zoom) the screen image size

Fixing Validation Errors

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

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

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

- 2. Click the page number to go to the page number in the PDF view on the left side of the template editor screen.
- 3. Review the page and identify the errors and then edit the template to correct them.

4. Alternately, click Download to download the list of validation errors in an Excel .csv file that you can use or save for making future corrections to the template.

Viewing and editing an Excel Template

1. Click the pencil icon \swarrow to open the Excel file.

NOTE: When you open the Excel template document, it is available in Read-Only mode for other users.

- 2. Make edits to your Excel document.
- 3. Click Save.
- 4. Close the Excel Document. Your changes are saved and uploaded to the CodySoft server.
- 5. Click Unlock Template and Return to Project

Adding Elements

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

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

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

- 4. Click Edit Template
- 5. **Open** the document in Word when prompted
- 6. Click Enable Editing if prompted
- Navigate to the page where you want to add elements to the template.
 NOTE: If you enter a page number in the page navigation bar in the center column for Elements, the Preview window on the left updates to that page.
- 8. Add elements from your data grid, rules grid, or operational grid. The format for these elements is to surround them with double brackets. For example, if your data grid attribute is Plan_Name, you would create an element called [[Plan_Name]] in your CodySoft template.
- 9. Save the document in Word
- 10. Close the document
- 11. Click Save

Template revisions

You can roll back a template to any previous revision. On the list of templates, click the plus sign (+) icon at the end of the row of any template to view previous versions of the template and roll back if

Revision 61 Draft Saurabh Sharma 05/13/2021 10:22:43 AM Revision 60 Draft Cory Belden 05/03/2021 03:20:59 PM Revision 59 Draft Al Valenti 05/03/2021 03:12:56 PM Revision 58 Draft Cory Belden 05/03/2021 03:12:56 PM Revision 58 Draft Cory Belden 05/03/2021 03:00:36 PM Revision 57 Draft Al Valenti 05/03/2021 02:53:36 PM	version	Status	орианси ву	Opuated On	
Revision 60 Draft Cory Belden 05/03/2021 03:20:59 PM Revision 59 Draft Al Valenti 05/03/2021 03:12:56 PM Revision 58 Draft Cory Belden 05/03/2021 03:12:56 PM Revision 58 Draft Cory Belden 05/03/2021 03:00:36 PM Revision 57 Draft Al Valenti 05/03/2021 02:53:36 PM Revision 56 Draft Al Valenti 05/03/2021 02:53:36 PM	Revision 62	Draft	Saurabh Sharma	05/13/2021 10:23:41 AM	3
Revision 59 Draft Al Valenti 05/03/2021 03:12:56 PM Revision 58 Draft Cory Belden 05/03/2021 03:00:36 PM Revision 57 Draft Al Valenti 05/03/2021 02:53:36 PM Revision 56 Draft Al Valenti 05/03/2021 02:53:36 PM	Revision 61	Draft	Saurabh Sharma	05/13/2021 10:22:43 AM	3
Revision 58 Draft Cory Belden 05/03/2021 03:00:36 PM Revision 57 Draft Al Valenti 05/03/2021 02:53:36 PM Revision 56 Draft Al Valenti 05/03/2021 02:53:36 PM	Revision 60	Draft	Cory Belden	05/03/2021 03:20:59 PM	3
Revision 57 Draft Al Valenti 05/03/2021 02:53:36 PM Pavician 56 C Al Valenti 05/02/2021 02:53:32 PM	Revision 59	Draft	Al Valenti	05/03/2021 03:12:56 PM	3
Povicion 56 0 (1997)	Revision 58	Draft	Cory Belden	05/03/2021 03:00:36 PM	3
Revision 56	Revision 57	Draft	Al Valenti	05/03/2021 02:53:36 PM	٢
L reated from Kevision 54	Revision 5	ted from Revis	ion 54	05/03/2021 02:52:23 PM	3
				04/26/2021 04:51:11 PM	3
Revision 54 Draft Al Valenti 04/26/2021 03:30:06 PM	Revision 54	Draft	Al Valenti	04/26/2021 03:30:06 PM	3

necessary. The Revisions history screen displays revision(s) that have been created from a prior revision in bold and identifies the prior revision number from which they were created.

Overview of Assets

The Assets screen

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

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

Collateral Management module®								(CC	DYS	O	-T _®			Gear	4) ch Pro	piect	s
Home Projects Rules L	:h	Incontant	Dees	rt a	Archi		Casab	Deculat			lmin				Jean		Jeec	
,	ibrary nent Kits	Inventory Create K	Repo				Search I	Regulato	лу ка	Jies Ad								
	Ient Kits	Create K	it sea	rch Leg	acy	Create	e Legacy											
Assets																Creat	e As	se
▼ Active Assets																		-
Name		Category	Туре		Stat	tus	Create	ed By	Crea	ated On	Las	t Modified	Dat	e Modified				
		~		~		~												
400RulesGrid	۲	Data	Excel D	ata	Dra	ft	Attila	Koz	05/	11/2020	Sau	rabh S	05/	13/2021	~	۵	0	
SBDataGrid2020	۲	Data	Excel D	ata	App	roval P	Steph	en B	02/	18/2020	Sau	rabh S	05/	13/2021		205	0	
10-18 Demo Benefit Grid	۲	Data	Excel D	ata	Dra	ft	Al Val	enti	10/	17/2016	Sau	rabh S	05/	13/2021	\checkmark	۵	0	
Attila's Rule Grid	۲	Data	Excel D	ata	Dra	ft	Attila	Koz	01/	13/2021	Atti	la Koz	04/	29/2021	\checkmark		0	
Corys Sample Rules Grid	۲	Data	Excel D	ata	App	roval P	Cory F	Belden	08/	07/2020	Cor	y Belden	03/	12/2021		205	0	
<u>ContentEditor</u>	۲	Content	CodySo	oft	Dra	ft	Brian	Yavo	06/	17/2019	Gau	ırav Si	02/	12/2021		۵	0	
SBTestRulesGrid100119A	٢	Data	Excel D	ata	<u>Pub</u>	lished	Steph	en B	10/	02/2019	Ste	phen B	01/	19/2021			0	
Test small	٢	Content	CodySo	oft	<u>Dra</u>	ft	Attila	Koz 01/07/2021		Atti	Attila Koz		07/2021		۱	0		
test 1-7 3 Content CodySoft	۲	Content	CodySo	oft	<u>Dra</u>	ft	Attila	Koz	01/	07/2021	Atti	la Koz	01/	07/2021		۱	0	
test 1-7 2 Content CS	۲	Content	CodySo	oft	<u>Dra</u>	ft	Attila	Koz	01/0	07/2021	Atti	la Koz	01/	07/2021		۵	0	
Showing page 1	of 24																	
 Cancelled Assets 																		_
Name				Cato	aony	Туре		Status		Created	By	Created	On	Last Mod	lified	Date	Mo	dif
			_	Cate	yory V	Type	~	Status	,	Created	Бу	Created				Date	PIO	un
Test 1-7 2				Cont		File III		Cance	lled	Attila Ko		01/07/2	121	Attila Ko] 7	01/0	17/2	02
Test 1-7			<u>د</u>	Cont						Attila Ko				Attila Ko				
Test all capital extension			<u>ب</u>	Cont		CodyS		Cance		Attila Ko		01/07/2		Attila Ko				
SBnoacupunctureAsset						Plain 1										-	· ·	
SonoacapanetaieAsset			Conte			Plail	-CAL	Cancelled St		Stephen	Stephen B 02/11/2		2020 Stephen B 2020 Stephen B		0			02

The screen provides two work areas:

- Active Asset
- Canceled Assets

From the Assets screen you can create a new asset by clicking **Create Asset**. See Adding a New Asset to the Library.

Active Assets area

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

- Name Click the underlined document name to access the Edit Asset screen.
- View Indicates if the asset is editable (the pencil editing icon) or read only (the eye icon). Click the appropriate icon to open the asset for editing or to view in read only mode.
- Category Displays the Asset Category selected when the asset was created
- **Type** Displays the Type selected when the asset was created

- Status Displays the Status of the asset:
 - o Draft
 - Approval Pending
 - Approved
 - o Published
- Created By Displays the name of the person who created the asset
- Created On Displays the date the asset was created
- Last Modified By Displays the name of the person who last edited the asset
- Date Modified Displays the date the asset was last edited
- Validate Click the green arrow *subsection* to validate that the asset contains no errors
- Review icon Click the review icon to send a document for review and approval
- Cancel icon Click the cancel icon to cancel the asset
- Plus sign (+) icon Click the plus sign (+) icon to view previous versions of the asset and roll back if necessary.

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

VEISION	Status		opuated on	
Revision 62	Draft	Saurabh Sharma	05/13/2021 10:23:41 AM	3
Revision 61	Draft	Saurabh Sharma	05/13/2021 10:22:43 AM	3
Revision 60	Draft	Cory Belden	05/03/2021 03:20:59 PM	3
Revision 59	Draft	Al Valenti	05/03/2021 03:12:56 PM	3
Revision 58	Draft	Cory Belden	05/03/2021 03:00:36 PM	3
Revision 57	Draft	Al Valenti	05/03/2021 02:53:36 PM	٢
Revision 5	ated from Revis	lenti	05/03/2021 02:52:23 PM	3
Revision 55	Draft	Al Valenti	04/26/2021 04:51:11 PM	3
Revision 54	Draft	Al Valenti	04/26/2021 03:30:06 PM	3

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

Adding a New Asset to the Library

The process for adding assets to a CodySoft library in a project is the same for all kinds of assets:

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

												6	3 (7		
CollateralManagement module®								[Sea	rch Pr	ojects
Home Projects Rule:	s Li	brary li	wentory	Rep	orts Arc	hives Sear	ch Reg	ulatory Rules	Admin						
Assets														Creat	te Asse
 Active Assets 					1				1			_			_
Name	View	Categor	у Туре		Status	Created B	Ву	Created On	Last Modifie	d B Date Modifier					_
				۲											
10-18 Demo Benefit Grid	۲	Data	Excel (Data	Publishe	d Al Valent	i	10/17/2016	Alphonse Va	al 12/30/2019			0	+	
ASPOSE Testing ANOC	۲	Data	Excel (Data	Publishe	d Annie O'F	Reilly	02/19/2019	Cory Belder	12/30/2019			0	+	
ASPOSE Testing ANOC	۲	Data	Excel 0	Data	Publishe	d Annie O'F	Reilly	02/19/2019 Cory Belden		12/30/2019			0	+	
Oct 10 new asset	۲	Data	Excel (Data	Draft	Cory Belo	den	10/10/2019	Alphonse Va	al 12/26/2019	~	۵	0	+	
SBTestRulesGrid100119	۲	Data	Excel 0	Data	Publishe	d Stephen	Billias	10/02/2019	Stephen Bil	lias 12/05/2019			0	+	
Test for Content	۲	Content	File Up	load	Draft	Alphonse	Val	11/22/2019	Alphonse Va	al 11/22/2019			0	+	
NEW ASSET UPLOAD	۲	Data	Excel (Data	Draft	Alphonse	Val	11/19/2019	Alphonse Va	al 11/21/2019	1		0	+	
Attila Rollback T1	۲	Content	File Up	load	Draft	Attila Koz	ma	11/11/2019	Attila Kozm	a 11/11/2019			0	+	
Brand New Test	۲	Data	Excel 0	Data	Draft	Brian Yav	ors	08/08/2019	Cory Belder	09/23/2019	~		0	+	
Image Asset Test 0821	۲	Images	File Up	load	Approva	P Cory Belo	den	08/21/2019	Cory Belder	08/22/2019			0	+	
Showing pa	ge 1 o	of 22													
* Cancelled Assets															
Name	V	liew Ca	tegory	Туре		Status	Creat	ted By	Created On	Last Modified By	D	ate I	Modi	fied	
		C	۲		•										
SBAcupunctureAsset		Co	ntent	Plain	Text	Cancelled	Step	hen Billias	12/05/2019	Stephen Billias	1	2/05	/201	9	
PRAbdDedAsset		Co	ntent	Plain	Text	Cancelled	Step	hen Billias	12/05/2019	Stephen Billias	1	2/05	/201	9	1
Stream5 Asset Roll Back 2		Co	intent	File U	Jpload	Cancelled	Attila	Kozma	11/08/2019	Attila Kozma	1	1/12	/201	9	1
												-			-

3. Click Create Asset. The Create Asset dialog displays:

Create Asset

	Save	
Name *		
Asset Category *	Images Y	
Туре *	File Upload	
Status *	Draft	
Line Of Business *	Select options 💌	
Description	ii.	
File to Upload:	Browse No file selected.	

- 4. Enter an asset Name. Special characters like "\$" and "%" are allowed in asset filenames.
- 5. From the Asset Category drop-down list, select a category from these choices:

- **Content** files for use in CodySoft, either as File templates for CodySoft Editor templates, or other asset content files.
- **Data** Data files. (The required format for use with rules for the Document Editor: Microsoft Excel.)
- **Images** Graphic files for layout. (Required formats for use with rules for the Document Editor include: jpeg, jpg, png, gif and bmp.)
- **Logos** Graphic files for your company's identity. (Required formats for use with rules for the Document Editor include: jpeg, jpg, png, gif and bmp.)
- 6. From the Type field drop-down list, select the asset Type. Your choices depend on the Asset Category you have chosen:
 - For Content:
 - \circ File Upload
 - \circ CodySoft Editor
 - For Data
 - File Upload
 - Excel Data Asset
 - For Images or Logo, Type is File Upload

The Status field defaults to Draft for Create Asset

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

٠

13. Click **Save.** The asset appears on the list of assets. See *Overview of assets*.

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

Edit an Asset

To edit an asset:

- 1. Click the document name
- 2. On the Edit Asset screen, click Edit Document
- 3. Edit the document
- 4. Click Save
- 5. Close the document

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

Send an Asset for Review

To send an asset for review:

- 1. Click the review icon on any asset in Draft status.
- 2. Change the Status to Approval Pending
- 3. Identify the Approval Method, either Concurrent or Routing
- 4. Select approvers from the list:

Approve or Request Approval		,
\bigcirc Draft \bigcirc Approval Pending \odot A	$pproved \bigcirc C$	ancelled
Routing Oconcurrent		
Available Approvers		Selected Approvers
Adrienne Olson	^	
Alphonse Valenti		
Amy Dubay		
Annarose Lilly		
Brad Boyer		
Brian Test		
Brian Yavorsky		
Candace McCool-Gill		
Carol Pray		
Cody Test User		
Cory Belden		
Dea Wilkins		
Debby Golonka	~	

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

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

Review an asset

- 1. To review and edit the document, click the PDF file icon 📟 for the asset.
- 2. Review the document and add comments as you would in a Template review. See *Marking up documents with the Markup Tool*.
- 3. When you have completed your review, close the Review window.

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Cancel an Asset

To cancel an asset:

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

You can also cancel an asset by this method:

- 1. Click the review icon on any asset
- 2. Change the Status to Cancelled. Do not select any approvers.
- 3. Click **Ok**. A dialog displays, asking you to confirm the cancel action.
- 4. Click **Ok** again. The asset is moved to the Cancelled assets list.

Notes on cancelling assets:

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

Validate an Asset

To validate the correctness an asset before it is published:

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

Asset is valid	×
Testing 13June is valid.	
	Ok
	///

If the asset contains errors, you'll receive an error message with detail on where you need to edit the asset to make corrections or have CodySoft make the corrections for you, as in this example message

Validation Error List X Illegal characters found - '%', '#'. Please check C4 Illegal characters found - 'Space'. Please check C12 Illegal characters must be fixed before continuing. Do you want us to replace them for you? Yes No The following cell(s) have leading or trailing spaces: D8; E8 Remove Leading Spaces Remove Both Leading and Trailing Spaces Leave As Is

- 2. Select Yes to have CodySoft correct the errors in column C or select No to fix the errors yourself.
- 3. Optionally select to remove leading or trailing spaces or both, or leave the trailing spaces
- 4. Edit the asset if necessary to fix validation errors
- 5. Select the green validation arrow again to re-validate.
- 6. Follow the steps to approve or re-approve and publish or re-publish the asset. See *Send an Asset for Review* and *Publish an Asset*.

Publish an Asset

To publish an asset after it has been approved:

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

F									Adm	come s In He	stepni <u>lip L</u> 5 (75	ogoff	99
Collateral Management											Sear	ch Pr	ojects
Home Projects Rule:	s Li	brary In	ventory Rep	orts Archiv	es Search Reg	ulatory Rules	Admin						
	_								_	_		_	
ssets												Creat	te Asset
												Creat	ie nasei
 Active Assets 													
ame	View	Category	Туре	Status	Created By	Created On	Last Modified B	Date Modifie	¢				
		•		T									
BTestRulesGrid100119	۲	Data	Excel Data	Approved	Stephen Billias	10/02/2019	Stephen Billias	01/07/2020			0	+	
0-18 Demo Benefit Grid	۲	Data	Excel Data	Published	Al Valenti	10/17/2016	Alphonse Val	12/30/2019			0	+	
SPOSE Testing ANOC	۲	Data	Excel Data	Published	Annie O'Reilly	02/19/2019	Cory Belden	12/30/2019			0	+	
SPOSE Testing ANOC	۲	Data	Excel Data	Please	confirm	×	Cory Belden	12/30/2019			0	+	
oct 10 new asset	۲	Data	Excel Data	Please	comm	^	Iphonse Val	12/26/2019	v		0	+	
est for Content	۲	Content	File Upload	Finaliz	e Asset and	Publish it?	Aphonse Val	11/22/2019			0	+	
IEW ASSET UPLOAD	۲	Data	Excel Data				Aphonse Val	11/21/2019	\checkmark		0	+	
LTT ADDET OFLOAD	۲	Content	File Upload				Attila Kozma	11/11/2019			0	+	
				-		res No	Corv Belden	09/23/2019			-	+	
Attila Rollback T1 Brand New Test	۲	Data	Excel Data				Jory beiden	03/23/2015	~	2	0	-	

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

Creating CodySoft[®] content using IF statements

IF Statement Concept

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

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

IF Statement Syntax

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

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

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

To add content to a template:

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

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

Select Attribute Filter: Plan_Name Plan_Name	Variation. 2021 ~	×
	Ok	Cancel

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

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

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

1					
		t A generally helps of ed nursing facilities		vided by hospitals (for gencies).¶	-inpatient
	utpatie			(such as physician's se durable medical equip	
Section-2.3	-		·Carolina ·Medi	Assistance (Medica cal Assistance (Me	
Assistance (Me that help with r resources. Each are covered, an	edicaid nedica n•state id•the•c	l) and Kentucky Me il and long-term care decides what counts	dicaid are joint Fe e costs for certain s as income and re	aid, North Carolina Me deral and state govern people who have limit sources, who is eligible how to run their pro-	ment programs ted incomes and le, what services
ancy tonow the	Feder	al guidelines.¶		1	
In addition, the Ohio Medicaid people with M	re are , Nortl edicare	programs offered th h Carolina Medical e pay their Medicare	Assistance (Medie costs, such as the	nia Medical Assistance caid) or Kentucky Mec cir Medicare premiums come and resources say	licaid that help These
In addition, the Ohio Medicaid people with Me "Medicare Sav year:¶	re are , Norti edicare ings P	programs offered th h Carolina Medical e pay their Medicare rograms" help peop	Assistance (Medie costs, such as the	nia Medical Assistance caid) or Kentucky Mec ir Medicare premiums	licaid that help These
In addition, the Ohio Medicaid people with Me "Medicare Sav year:¶ [[IF:RuleId={F •• Qualifi premium	ere are , Nortl edicare ings P: BDE} ed Me ms, an	programs offered th h Carolina Medical pay their Medicare rograms "help peop]]¶ edicare Beneficiary d other cost-sharing	Assistance (Medie costs, such as the le with limited inc (QMB): Helps p (like deductibles,	nia Medical Assistance caid) or Kentucky Mec ir Medicare premiums	licaid that help These re money each d Part B
In addition, the Ohio Medicaid people with Me "Medicare Sav year:¶ [[]IF RuleId={F •→ Qualifi premiu people •→ Specifi	ere-are ,-North edicare ings-P: (BDE) ed-Me ms,-an with-Q ed-Lor	programs offered th h Carolina Medical pay their Medicare rograms" help peop 	Assistance (Medie costs, such as the le with limited ind (QMB): Helps p (like deductibles, e for full Medicai e Beneficiary Phu	nia Medical Assistance aid) or Kentucky Med ir Medicare premiums some and resources say ay Medicare Part A an 'coinsurance, and copa	licaid that help These re money each d Part B syments). (Some- y Part B-
In addition, the Ohio Medicaid people with Medicare Sav year:¶ [[[F:RuleId={F •- Qualifi premius people- •- Specifi premius	ed Me with Q ed Low	programs offered th h Carolina Medical a pay their Medicare rograms "help peop -]]¶ edicare Beneficiary d other cost-sharing MB are also eligibl w-Income Medicar heligible for full Me	Assistance (Medie costs, such as the le with limited ind (QMB): Helps p (like deductibles, e for full Medicai e Beneficiary Phu	nia Medical Assistance aid) or Kentucky Med ir Medicare premiums some and resources say ay Medicare Part A an coinsurance, and cope d benefits (QMB+).)¶ is (SLMB+): Helps pa	licaid that help These re money each d Part B syments). (Some- y Part B-
In addition, the Ohio Medicaid people with Medicare Sav year:¶ [[IF:RuleId={F •• Qualifi premius people •• Specifi premius [[IF:RuleId={T	ed Me ms, an with Q ed Low ms and conFB	programs offered th h-Carolina Medical: a pay their Medicare rograms "help peop a dicare Beneficiary d other cost-sharing MB are also eligible w-Income Medicar d eligible for full Me DE }]]¶	Assistance (Medie costs, such as the le with limited ind ((QMB): Helps p ((like deductibles, e for full Medicai e Beneficiary Ph dicaid benefits. []	nia Medical Assistance aid) or Kentucky Med ir Medicare premiums some and resources say ay Medicare Part A an coinsurance, and cope d benefits (QMB+).)¶ is (SLMB+): Helps pa	licaid that help a. These we money each d.Part B. tyments). (Some- y.Part B. E}]]]¶
In addition, the Ohio Medicaid people with Medicare Sav year:¶ [[IF:RuleId={F •• Qualifi premius people •• Specifi premius [[IF:RuleId={F •• Specifi	ed · Loy ed · Loy ed · Loy	programs offered th h-Carolina Medical: a pay their Medicare rograms "help peop a dicare Beneficiary d other cost-sharing MB are also eligible w-Income Medicar d eligible for full Me DE }]]¶	Assistance (Medie costs, such as the le with limited ind "(QMB): Helps p (like deductibles, e for full Medicai e Beneficiary Plu edicaid benefits. []	nia Medical Assistance aid) or Kentucky Med ir Medicare premiums some and resources say ay Medicare Part A an "coinsurance, and cops d benefits (QMB+).)¶ is (SLMB+): Helps pa ENDIF RuleId= {FBD	licaid that help a. These we money each d.Part B. tyments). (Some- y.Part B. E}]]]¶

IF Statement Variations

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

Nested IF statements

You can have nested IF statements. For example:

January 1 --- December 31, 2017 ¶ . Evidence of Coverage: ¶ Your Medicare Health Benefits and Services and Prescription Drug Coverage as a Member of [[RuleId={AV2016DG}(Plan_Name<2017>)]]SM (HMO SNP)¶ This booklet gives you the details about your Medicare health care sand prescription drug coverage from January 1 -- December 31, 2017. It explains how to get coverage for the health care services and prescription drugs you need. This is an important legal document. Please keep it in a safe place.¶

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

IF statements on a single line

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

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

Rule Conditions for IF Statements

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

Edit Rule	
	Apply Asset X Save
Name *	
Туре *	Type Images V Name Asset name
Description *	Copy Logo RD Data
Line Of Business *	Content ////////////////////////////////////
Applies To	Embedded AV 2016 Data Grid for TEST
Asset	Template embedded content

The confirmation message displays:

Apply	/ Asset	×
Туре	Embedded V Name Asset name	
Embe	edded content will be used instead of Asset conte	ent.
		Ok Cancel

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

Rules

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

There are two types of rules in CM:

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

Creating a Template Rule

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

Home	Projects	Rules	Library	Inventory	Reports	Archives	Search Regulatory Rules	Admin
New Rule	e Rules	Search F	Rules R	ules Wizard				
Create I	Rule							Save
Name *								
Туре *			Template	Rule		Ŧ		
Description	۱*					1		
Line Of Bus	siness *		Select o	ptions		Ŧ		
Asset			None					
Property *			Job Nun	nber		•		
			Equal		qual To	Contains	Not Contains (ave your work and exit the application. Maintenance will take 10

- 2. Enter a rule **Name.** (Use letters and numbers only—do not use any special characters such as dashes)
- 3. From the Type field drop-down list, select **Template Rule** to use the rule in your template
- 4. Enter a brief **Description** of the asset
- 5. Select all lines of business that apply to this asset.
- 6. In the **Asset** field, leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset:
 - a. Click None
 - b. From the Type field, click the asset type, for example, Data. You can filter on the list of available assets by entering the first letter(s) of the asset name in the Name field.
 - c. Select the option button next to the to the asset you want to use
 - d. Click OK. The asset name displays in the Asset field
- From the first Property field drop-down list, select the property to which the asset applies. The pull-down list displays the default list of **project properties** such as Start Date, Requested By, and Media Type.
- 8. In the second Property field, enter the condition you want to set for that value for the property, or select it from a drop-down list. For example, if you chose Media Type as the property in the first Property field, select a Media Type that you wish to set as your condition (such as "EOC") from the drop-down list in the second Property field so that Property = "Media Type" and Media Type="EOC".
- 9. Click the **appropriate modifier** for your property.



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

Project.MediaType == 'EOC'

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



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

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

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

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

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

Creating a Data Asset Rule

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

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

Home	Projects	Rules	Library	y Inventory	Reports	Archives	Search Regulatory	Rules	Admin					
New Rule	Rules	Search Ru	iles	Rules Wizard										
Create I	Rule													
														Save
Name *														
Туре *		0	Data As	sset		*								
Description	•					le de la constante de la consta								
Line Of Bus	siness *		Select	options		Ŧ								
Applies To		M	lone											
Asset		Ŀ	lone											
Property *						-								
					qual To			()	Or	And			
We will be	e performing n	aintenance (on the Co	odySoft servers ev	ery morning a	4 AM ET. If you	are working at that time,	please s	ave your v	vork and	l exit the ap	plication.	Maintenai	nce will take 10

- 1. Enter a rule **Name**. (Use letters and numbers only—do not use any special characters such as dashes)
- 2. From the Type field drop-down list, select **Data Asset** to apply the rule against an item in your data grid, operational grid, asset application grid, or rules grid.
- 3. Enter a brief **Description** of the asset
- 4. Select all lines of business that apply to this asset.
- 5. In the **Applies to** field, leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset like a grid with rules you've created to bring in content within IF statements, follow these steps:
 - a. Click None

- b. From the Category field, click the asset type. In most cases, because you chose Data Asset as the Type, this choice is **Data**.
- c. Select the option button next to the to the asset you want to use
- d. Click **OK**. The asset name displays in the **Applies to** field
- 6. In the **Asset** field, leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset:
 - e. Click None
 - f. From the Type field, click the asset type, for example, Embedded, which will bring in the variable content that you've placed between IF statements in your template.
 - g. Optionally use the Name field as a filter to reduce the number of assets in the list. For example, if you enter Bene in the Name field, only assets with Bene in the name display
 - h. If you are applying your rule to an asset type instead of using embedded content, select the option button next to the to the asset you want to use
 - i. Click OK. The asset name or category displays in the Asset field
 - j. From the first Property field drop-down list, select the property to which the asset applies. The pull-down list displays the list of **attributes** in the data asset that you entered in the Applies To field. For example, if you are creating a rule that uses a rules grid in Applies To, the list will be of the rules in the grid. See *Creating a Rules Grid*.
 - k. Use the second Property field to set the conditions for your rule to follow. For example, if you are using a rules grid in Applies To and you chose "altlanguage," as the property, populate the second property field with whatever marker you used on your rules grid to indicate which plans this rule applies to, for example, you may use a lowercase "x" in the columns for the plans for which this rule applies.
 - I. Click the **appropriate modifier** for your property.



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

Property *	altlanguage		•	* X					
	Equal To	Not Equal To	Contains	Not Contains	()	Or	And	
SB 11-4 Rules Grid	.altlanguage_2017 =	= 'χ'						+	1 0

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

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

Using the Rules Wizard

You can use the Rules Wizard to create an entire set of new rules automatically.

1. From the Rules tab, select Rules Wizard. The Rules Wizard screen displays:

Home	Projects	Rules	Library	Inventory	Reports	Archives	Search Regulatory Rules	Admin		
Rules V	Vizard						\searrow			
								Preview		
Line Of Bu	siness *		Select op	tions		*				
Prefix										
Suffix										
Property M	arker *									
Rules Grid	*		None Selec	ted						
We will be	We will be performing maintenance on the CodySoft servers every morning at 4 AM ET. If you are working at that time, please save your work and exit the application. Maintenance will take 10 minutes or less. Thank you.									
Home Proje This do				ports <u>Admin</u> on that is for the	Help proprietary us	e by Cody Co 2020 Cody (nsulting only and cannot be repro Consulting Group, Inc	duced or used without the sole permission of Cody Consulting.		

2. Select one or more lines of business from the dropdown list

Home Projects Rules	Library Inventory I	Reports Archives	Search Regulatory Rules	Admin	
Rules Wizard					
Line Of Business *	Select options				Preview
Prefix	Filter: Enter keyword ✓ Check all X Unchec				
Suffix	Commercial]			
Property Marker *	Medicare]			
Rules Grid *	 Medicare Advantage Medicare South Florida 	1			
We will be performing maintenant	CE		u are working at that time, please s r less. Thank you.	save your work and exit the application. Main	tenance will take 1

Home Projects Rules Library Inventory Reports Admin Help

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- 3. Optionally enter a **Prefix** to prepend to all the rule names in the rules grid you create. For example, you might want to identify all the rules in this grid by the prefix ABC.
- 4. Optionally enter a **Suffix** to append to all the rule names in the rules grid you create, for example, if you want to identify the rules in this grid by the suffix of the plan year.

5. Select a **Property Marker** for your rules grid. This is the character you use in the plan columns of the rules grid to specify whether the rule applies to that plan. In this example, the lower case "x" is used:

	А	В	С	D	E	F
1			PlanName	001(H1234)	002(H1234)	003(H1234)
2			Variant	2020	2020	2020
3			Attribute	OR and WA	OR and WA	Oregon
4			Plan_Name	Advantage	Advantage	Medicare Advantage Bronze
5	Rule description	Location in model	Rule			
6	if plan meets 5% alternate language threshold	title page (ANOC and EOC)	altlanguage	x		x
7	if plan has medical deductible in current year AND/OR will have a medical deductible next year	ANOC summary of important costs chart	ANOCmeddeductible			x

6. In the Rules Grid field, click **None Selected**. The Apply Asset dialog displays:

Apply Asset			×
Category Data 🔻	Name	Asset name	
 <u>10-18 Demo Benefit Grid</u> <u>10-18 Demo Operational Grid</u> <u>11-4 DSNP EOC Rules Grid</u> <u>2017 Asset Application Grid</u> <u>ANOC Rules Grid</u> 			

The Rules grid must be a published data asset in the Asset Library. See *Rules Grid Format* and *Adding a New Asset to the Library*.

- 7. Select the rules grid you want to use as your template for creating the new rules grid.
- 8. Click OK.

NOTES: The rules wizard is case sensitive to prevent you from creating duplicate rules. Also, the wizard will error if there are spaces or disallowed special characters in a Prefix of Suffix, or if you don't enter values for any of the mandatory fields marked with a red asterisk (*).

9. Click **Preview** to preview your newly created rules. The Rules Wizard Preview screen displays:

	Duplicates: 0 - OK: 89		
Created Rule Name	Rule Description	Rule Attribute	
SBTESTANOCmeddeductible2021	if plan has medical deductible in current year AND/OR will have a medical deductible next year	ANOCmeddeductible	ок
SBTESTmeddeductible12021	if plan has a deductible for medical benefits (can be plan level, service category or both types of deductible)	meddeductible1	ок
SBTESTplanleveldeductible2021	if plan has plan level deductible	planleveldeductible	ок
SBTESTnoplanleveldeductible2021	if plan has no plan level deductible	noplanleveldeductible	ок
SBTESTanydeductible2021	if plan has medical and/or Part D deductible	anydeductible	ОК
SBTESTnamechange2021	if plan's name is changing	namechange	ОК
SBTESTplanconsolidation2021	if plan is consolidating	planconsolidation	ОК
SBTESTANOCSec12021	if plan's ANOC includes Section 1	ANOCSec1	ОК
	if plan's ANOC does not include Section 1	ANOCrecost	OK

a. If the Preview window indicates that all rules are OK, click **Create Rules**. The rules are created and added to the list of rules.

b. If the Preview window identifies duplicates already created in CM among the rules that the wizard is about to create, the Create Rules button changes to offer the ability to create just those rules that were validated as "OK":

Rules Wizard Preview: Rules: 56	- Duplicates: 1 - OK: 55		
Created Rule Name	Rule Description	Rule Attribute	
SBTESTaltlanguage2021	if plan meets 5% alternate language threshold	altlanguage	DUPLICATE
SBTESTANOCmeddeductible2021	if plan has medical deductible in current year AND/OR will have a medical deductible next year	ANOCmeddeductible	ОК
SBTESTPOS2021	if plan has a POS option	POS	ОК
SBTESTnonPOS2021	if plan does not have a POS option	nonPOS	ОК
SBTESTnamechange2021	if plan's name is changing	namechange	ОК
SBTESTplanconsolidation2021	if plan is consolidating	planconsolidation	ОК
SBTESTmeddeductible2021	if plan has a deductible for medical benefits (can be plan level, service category or both types of deductible)	meddeductible	ОК
SBTESTpremium2021	if plan has a monthly premium	premium	ОК
SBTESTnopremium2021	if plan has no monthly premium (could include LEP content)	nopremium	ок
		Create ALL (55) 'OK' Rul	es Cancel

c. If none of the rules to be created passes validation (all are duplicates) then the Create Rules button is greyed out and you can only click **Cancel**.

Naming a Rule for Embedded Content Using IF Statements

Rule Name and Beginning Syntax

Rule Name

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

Plan Type Abbreviations:

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

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

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

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

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

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

Add Rules to Project

Add Rules to Project is useful if you are adding rules that were created by someone else or for another project and you want to include them in your project.

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

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

Add Rules to	Project				
Name					
Туре *	Template Ru	le 🗸			
Created By	Select U	ser Name 💙			
Last Updated	i By Select U	ser Name 💙			
Asset	Select A	sset Name 💙			
					Search
Name	Description	Created By	Last Updated By	Asset	
-					

2. Filter your search criteria using the fields provided:

Name:	Enter the rule name if known
Туре:	Select Template Rule (for Data grid rules) or Data Asset (for IF Statements). See <i>Rules</i> .
Created By:	Select a user name to search for rules created by that person
Last Updated By:	Enter a user name to search for rules edited by that person most recently
Asset:	Select asset associated with the rule from a dropdown list of all assets

3. Click Search

Your search results display in the table below:

Name	Description	Created By	Last Updated By	Asset	
Test6thrule	Test tilter 2nd instance	Stephen Billias	Stephen Billias		+
Test5thRule	Test filter 12-6	Stephen Billias	Stephen Billias		+
Test3rdRule	Test 12/5	Stephen Billias	Stephen Billias		+
Test2ndrule	Test 12/5	Stephen Billias	Stephen Billias		+
Test1stRule	Test 12/5	Stephen Billias	Stephen Billias		+
SBTestsinglebrac	SBTestsinglebrack	Stephen Billias	Stephen Billias		+
SBTestIF10416	SBTestIF10416	Stephen Billias	Stephen Billias		+
SBTestGWAltlang	Test IF Statement across	Stephen Billias	Stephen Billias		+
SBTest51018	Test asset in use and can	Stephen Billias	Stephen Billias	SBTest51018-1	+
Showi	ing page 1 of 1				Ŷ
				-	Close

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

Using Rules

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

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

- 9. Navigate to the page with the element to which you want to apply a rule
- 10. Click and drag the rule from the right column onto the element in the center column or drag the element from the center column onto the rule in the right column. Dragging works the same in either direction. You can also filter by typing the first letter(s) of the rule name in the blank box provided, to see a shorter list of rules starting with those letters. NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to

search for it. For example, if you are applying a rule to the element Plan_Name, the dialog filters and displays as in this example:

Filter: Plan_Name Plan_Name	3	Variation:	20 21 ~		
			Ok	Cancel	1

- 11. Click **OK** to use the selected element. The mapping must be an exact match or else an error message displays.
- 12. Click Test the Template.
- 13. Verify that the rule has been applied to the element.
- 14. Click **Commit Changes** to save your changes. Click **Undo** if you want to revert to the template's state before you made the changes, for example if you find an error in the way you applied a rule that you don't want to commit to the template

Inserting a rule in a document template

1. On the template editor screen, drag the rule to the appropriate variable element listed in the "Elements" column

NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to search for it. The mapping must be an exact match or else an error message displays.

- 2. Click **OK**. The rule is inserted in the document.
- 3. Click Commit Changes.
- 4. Click **Test the Template**. and select the plan and output type for the test template. The template is generated with the new rule.

Example: A template rule states that the Medicare Rx logo (Asset) is inserted into the template if both the project's Line of Business = Medicare AND its Plan Type = PDP, AND if its Media Type = Flyer (Properties).

Edit Rule

		Save
Name *	PDPflyer	
Туре *	Template Rule	
Description *	Insert Medicare Rx logo in all BDR Slyezs.	
Asset	Medicare Rx logo	
Property *	Job Number	Add
() Or And		
(4.1
Project.LineOfBusiness == 'M	edicare'	+ +
AND		+ +
Project.PlanType == 'PDP'		÷ t
)		11
AND		11
Project.MediaType == 'Flyer'		11

Sample of Complex Rule

Searching for a rule

- 1. From the dashboards, select Rules
- 2. From the Rules choices, select Search Rules.
 - a. Name Enter as much as you know of the rule's name.
 - b. Type Template Rule.
 - Created By Select the User Name of the person who created the rule from the dropdown list
 - d. Last Updated By Select the User Name of the person who last updated the rule from the dropdown list
 - e. Asset Select the associated Asset Name from the dropdown list.
- 3. Click **Search** (on the bottom right side of the screen).

Viewing Unassigned Elements

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



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

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

The Unassigned Elements dialog box opens.

- 2. Click any element name or page number in the list to navigate to the page number of the element you want to work on or click OK to close the list.
- 3. Click and drag the rule from the right column onto the element in the center column or drag the element from the center column onto the rule in the right column. Dragging works the same in either direction.

NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to search for it. The mapping must be an exact match or else an error message displays.

4. Click OK.

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

Adding, Viewing, and Editing Templates

Document templates and versions are created using the **Document Editor**, CodySoft[®]'s built-in word processing software. With the **Document Editor**, you can also apply rules to templates, and merge data files with versions. These documents are stored in the project record for easy access.

Adding a Word Document as a CodySoft® Editor Template

- 1. In the project record, click the **Templates** tab.
- 2. Click the Add Template link.
 - a. Name Enter the template's name.

NOTE: All template names are limited to 55 characters. If you enter a template name with more than the maximum number of characters, you will be prompted to enter a new name. Special characters like "\$" and "%" are allowed in template filenames, but not in the name of the file you are uploading.

- b. **Type** Select **Word** from the drop-down list.
- c. Click Browse.
- d. Select the file you want to upload. Click **Open**.
- e. Click **OK**. Template Parsing begins. You will be notified once the template has been parsed.

NOTE that a message indicates you can continue to work while the document is parsing.

You may continue to work while your document is uploading
±.

Viewing or editing a CodySoft® Editor Template

1. From the project's Templates tab, click the template's name link to access the Template Editor screen.

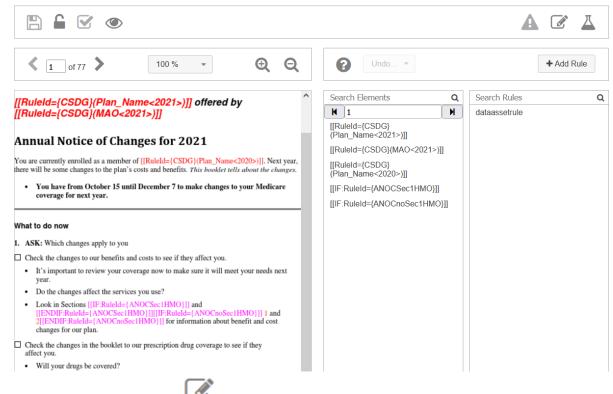
					Copy pr	roject Ca	ancel Project	Complete	On Hold	Exit	Sav
Details	Tasks	Discussions	Rules	Templates	Versions	Reviews	Attachments	Compliar	nce Analy	/ze	
dd Temp	late										
 Activ 	ve Templat	es									
 Activ No 		ame	Туре	Status	Created By	Created	Dn Updated F	3y Last Up	odated		

NOTE: Once you click this link, this template is now locked to other users. After you have completed the review or edit process, you must click Unlock Template and Return to Project.

The template editor screen displays:

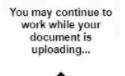
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Project - 109. Template - CY21 MAPD ANOC



- Click the Edit Template icon ² to edit the underlying Word Document.
- 3. Click the save disk icon in Word and close the document to save the document back to CodySoft[®]. The template reparses to capture changes made to the document. You are notified when the document is available again.

NOTE that a message indicates you can continue to work while the document is parsing.



Adding a File Template

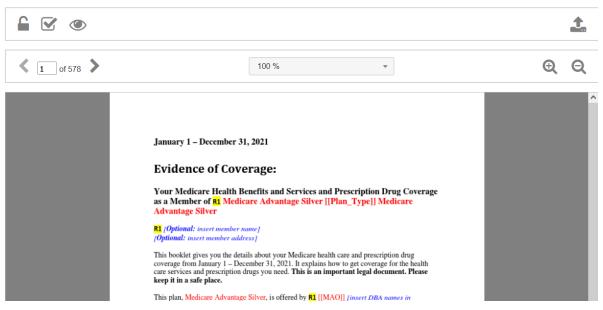
- 1. In the project record, click the **Templates** tab.
- 2. Click the Add Template link.
 - a. Name Enter the template's name.
 - b. Type Select File from the drop-down list.
 - c. Browse Browse to upload your file from your local drive.
 - d. Click OK.

Editing a File Template

1. Click the template name to open the file template screen.

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

Project - 109. Template - Test PDF



2. To make changes to a File Template, you can replace the existing template with an

updated copy by clicking the "Upload Replacement Template" icon

Adding an Excel Template

- 1. In the project record, click the **Templates** tab.
- 2. Click the Add Template link.
 - a. Name Enter the template's name.
 - b. Type Select Excel from the drop-down list.
 - c. Click OK.

Editing an Excel Template

1. Click the 💴 icon to open the Excel file.

Note: Once you open the Excel template document, this document will only be available in Read-Only view for other users. To unlock this template, you must save and close the Excel document.

- 2. Make edits to your Excel document.
- 3. Click Save in Excel.
- 4. Close the Excel Document. Your changes are saved and uploaded to the CodySoft[®] server.

Reviews and Schedules

Review Process for End Users

If you are in the end user role, you can respond to review tasks you are assigned, and you can mark up documents using the Markup Tool during Concurrent review or edit copies of Word documents using Edit File during Routing Review, to indicate where changes are necessary.

Accessing your tasks for review

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

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

You may begin 17 - New review task today for 285 - Test



he following task has been assigned to you (see below) and you may begin	now.
lequest Details:	
roject #: 285	

Project Name: Test			
Tenant: 1			
Task: New review task today			
Description: Did I get this notification?			
Planned Start Date: 2022-05-17			
Due Date: 2022-05-17			
Link to project: OPEN			

- 1. From the email, click Open from Link to Project
- 2. The document opens, ready for editing

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

1. Open a Project

2. Click the Review tab. Your tasks for review are listed:

Review Tasks

	Template	Review Round	Name	Start Date	End Date	Edit Method	
DocumentA	AnnotateTool 3-29-17	1	DocumentAnnotateTool	3/28/2017	4/3/2017	Markup Tool	

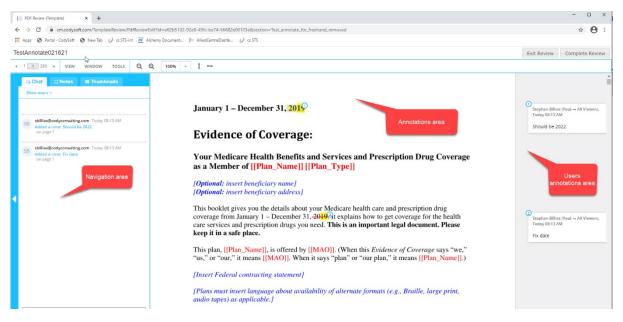
3. In the Edit Method column, click the Markup Tool if a Annotate review (or click Edit File if an Edit File review) to open the file for commenting.

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

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

Marking up documents with the Markup Tool

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



The screen is divided into three main areas:

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

export your annotations.

Annotations Area

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

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

то ~		HIGHL	IGHT ~
1			
			_
Benefit	Comment	Questio	n
		Cancel	Save
_			//_

- 2. Click the HIGHLIGHT dropdown to change the annotation type. The dropdown list displays the choices for annotation type:
 - **Highlight**—marks the text with highlight
 - Underline—marks the text as underlined
 - Insert—allows you to insert text in the annotation
 - Strikethrough—marks the text as strikethrough
 - Edit—copies the selected text into the annotation for editing
 - Mark section—to mark an entire section for annotation.
- 3. Enter text in the text box that describes the annotation, for example "Check plan types" or "Update contract year."
- 4. Click the TO dropdown in the upper left of the dialog box to select whether to make the annotation visible just for yourself or for all users assigned to the review.
- 5. Optionally select one of the tags to enable you and other reviewers to narrow the annotations to a subset, for example, Benefits questions. Your system administrator sets up the appropriate tags for your use.

Highlight color is based on the tag type:

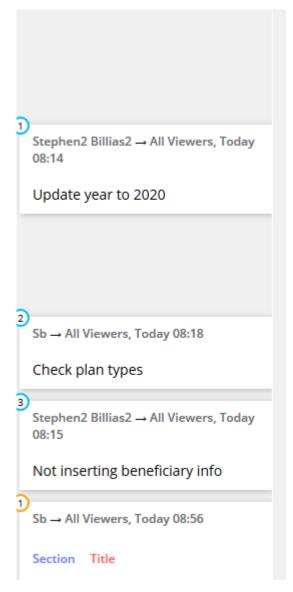
- Benefits in purple
- o Comments in red

- Questions in green
- 6. Click **Save** to save your annotation or click Cancel to cancel your annotation.

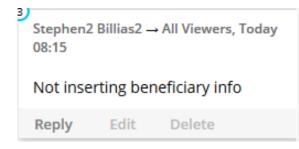
The tool uses your last selection of annotation type for the next annotation. You can change the type when you make the next annotation.

Users Annotations Area

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



If more than one person is reviewing the same document, their annotations appear in real time while you are in the review. You can reply (add a comment) to an existing annotation in the document, and edit an annotation you have made:



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

Navigation area

Navigation

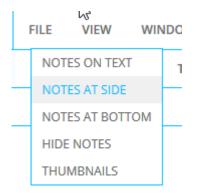
The Navigation area provides many tools for working in the review:



In the upper left of the Navigation area you can page through the file using the left and right arrows or enter a page number to jump to that page. Several menu choices provide additional functionality.

View menu

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



61

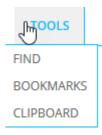
Window menu

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

WINDOW	
ZOOM IN	
ZOOM OUT	
FIT WIDTH	
FIT PAGE	
ROTATE PAGE	

Tools menu

From the Tools menu you can use the Find functionality to search the document, locate Word bookmarks, or bring in material from the Clipboard.



Chat

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

Notes

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

Ð	ເ⊋ Chat ☐ Notes III Thumbnails	
	Filter A	
	Find	x
	Group by: Date ~ Date	
	○ 1 day ○ 3 days ○ 7 days ○ 14 days ● All □ Show Unread Notes	
	Tags	
	No tags	Reset
	Authors	
	🗹 Stephen Billias (you)	
	2 / 2 notes shown	
	Y February 23 (2 notes)	
	Stephen Billias (You) → All Viewers, Yesterday 08:13	AM
	Fix date	page 1
	Stephen Billias (You) → All Viewers, Yesterday 08:13	AM
	Should be 2022	page 1

Thumbnails

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

	CHAT	NO	TES	THUMBNAILS
	SMALL	MEDIUM	LARGE	EXTRA LARGE
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	Elizabet intervention Elizabet inte	Marco - Anno Anno Anno Anno Anno Anno Anno A		
	internet and inter	4		
•	CHAPTER 1 Genty stated as a needer			

Sizing icons

The review space provides these additional navigation tools:

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

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 The horizontal double-arrow positions the entire annotations area horizontally as a single page

Complete review

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

When you have made all annotations and added all comments to other reviewers' annotations:

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

Confirm Commit Changes	
WARNING!	
Once changes have been committed, you marked as complete, and no further cha	
Please enter review task time:	
	Commit Cancel

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

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

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

Review Tasks						
 Tasks - Active Reviews 						
Template	Review Round	Name	Start Date	End Date	Edit Method	
SBTemplate50919	1	Review sample EOC	5/9/2019	5/30/2019	@ Ţ	

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

 Tasks - Completed Reviews 				
Template	Review Round	Name	Start Date	End Date
TestReviewProcess7518-2	1	TestReviewTemplate2Round1070518	7/5/2018	7/5/2018

Click the template name on a completed review to see a PDF of the completed review file with all collated markups.

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Editing documents in Edit File

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

NOTE: If more than one reviewer is assigned an Edit File review, the file is locked by the first person who opens it; only one person can edit the file at a time. You'll need to wait until the file is available for editing.

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

Completing tasks on the Review tab

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

- 1. From the projects list, go to the project for which you just completed the task.
- 2. In the project, click the Reviews tab. Your tasks for review are listed:

Review Tasks

 Tasks - Active Reviews 					
Template	Review Round	Name	Start Date	End Date	Edit Method
DocumentAnnotateTool 3-29-17	1	DocumentAnnotateTool	3/28/2017	4/3/2017	Markup Tool
Tasks - Completed Reviews					

- 3. Select the checkbox at the end of the row for a review to mark the task as complete.
- 4. At the confirmation prompt, click yes to confirm you have completed the task:

Please confirm	×
Are you SURE you wa	nt to complete this task?
	Vec
	Yes No

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

~

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

Review Husks						
▼ Tasks - Active Reviews						
Template	Review Round	Name	Start Date	End Date	Edit Method	
SBTemplate50919	1	Review sample EOC	5/9/2019	5/30/2019	©Ţ	

Review Process for Project Managers

Peview Tacks

When you have created a project and set it to In Progress, uploaded a template and applied rules to elements in your template, you're ready to send draft documents for review. Reviews take place both on the Template and its draft plan documents, and on the versioned documents after the template has been approved. The top tab of the reviews process is Reviews. You can conduct rounds of review on both the Template Reviews subtab and the Version Reviews subtab. The Review Summary and Review tasks are headings on both the Template Reviews and Version Reviews and Version Reviews tabs.

NOTE: You cannot start a review unless the project is in the In Progress state.

Creating Reviews

When you are ready to have your project documents reviewed, you create review tasks and assign them to the appropriate reviewers.

1. On the Templates tab, click the Template Review icon 🔊 on the row for the template you want reviewed:

	Tasks Discuss	sions Rules	Template	s Versions	Attachmen	ts Compliar	nce Analyze			
dd Templ	late									
- Activ	ve Templates									
No	Name	Туре	Status	Created By	Created On	Updated By	Last Updated			
1	Sample Template	CodySoft Editor	<u>Draft</u>	Cory Belden	05/11/2022	Cory Belden	05/11/2022	0	٩) +

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The Template Review dialog box opens.

Task name
Cory's Review Assignment
Assignee
Cory Belden ×
Start date
05/11/2022
End date
05/12/2022
Planned hours
1 🗘
Actual hours
0
Progress
)%
Description
Please review the document for content accuracy.
Delete Save 🖉 Cancel

- 2. Enter the following information:
 - a. Enter a Task Name
 - b. Select an **Assignee** from the list. If you select multiple assignees, individual tasks will be created for each assignee.
 - c. Enter a Start Date for the review
 - d. Enter an End Date for the review
 - e. Enter the Planned hours for the review
 - f. Leave the **Actual hours** and **Progress** fields blank, these are for the Assignee to fill in when completing the task.
 - g. Enter a **Description** of the task. This is what you are asking the Assignee to do. For example, if the task is for a specific plan or section instead of the entire template, be sure to include that information in the description.
- 3. Click **Save**. Note: If you click cancel on the first task before saving, it will exit out of the review space.
- 4. If you need to add additional task(s) with different assignments, you can use the + sign
 - a. The top + sign at the review level will create a new task
 - b. The + sign at the task level will create a new child task, beneath the task row that you clicked the + sign on

Template Review - Sample Template

Edit Method:	O Edit File	Markup Tool				
Plan Number:	Base Templa	te	~		Cancel	Begin Review
Month Day	Fullscreen	elect Columns				
Ass	ignee # of Da	ays Progress	Status Planne	d Actual	07 May08 May09 May10 May11 May 12 May13 May14 May15 May 16 May1	7 May 18 May
• 🖨	2	0%	1h	0h	to create a new task SampRefitempl	^
🗋 Cory	/ Belde 2	0%	1h	0h	to create a child task Cory's Review	

- 5. On the Template Review screen, confirm the **Edit Method**, either Markup Tool or Edit File. The default (and most common selection) is Markup Tool, which allows reviewers to provide comments on top of the document in a collaborative space. All comments are exportable in a single PDF or csv notes format. The Edit File method opens the file in its original format, such as a Microsoft Word document for editing, and restricts users to reviewing one at a time. **NOTE**: if the document you are editing is a PDF, you can only use the Markup Tool.
- If you would like to send a merged template out for a specific plan, select the plan for review from the **Plan Number** field (this pulls from the list of plans selected in the project). The default selection is Base template, which will send out the unmerged CodySoft editor template.

NOTE: If you select to review a plan, the system does a merge and creates a draft template version of that plan with the rules applied to elements in the template, and data brought into the draft. If you select the review the base template, then the elements and rules appear without any processing.

7. Click Begin Review. A confirmation message displays, click Ok.

			Confirmation ×
Template Review - Sample			Are you sure?
Edit Method: O Edit File O Mark		it File 💿 Mark	When you begin the review, tasks will be automatically assigned and reviewers will be notified by email.
Plan Numb	Base	Template	
Month	Day Fullscre	en Select Col	
	Assignee	# of Days Pi	
• 🖨		2	
D	Cory Belde	2	
D	Cory Belde	1 1	
• 🗢	Cory Belde	1	
D	Cory Belde	1	Ok Cancel

Add or Remove Reviewers while in Review

You can add or remove reviewers on an item already in review.

- 1. From the Tasks Tab, find the Review you wish to add an Assignee to.
 - a. To add a new review task, click the top + sign on that review:

67%	InProcess	9h	0h	+	Full T
0%	InProcess	1h	0h	• +	AND
0%	InProcess	1h	0h	• •	AND
100%	Complete	1h	0h		AND

b. To add a new child review task underneath an existing task, click the + sign on the task row you wish to be the parent task:

67%	InProcess	9h	0h		Full T
0%	InProcess	1h	0h	θ 📑	AND
0%	InProcess	1h	0h	• •	AND
100%	6 Complete	1h	0h		AND

- 2. On the Edit Task dialog, complete the Task Name, Assignee(s) (if multiple are selected a new task will be created for each of them), Start and End Dates, Planned Hours and Description of what the Assignee needs to do in the review.
- 3. Once you are done making changes/adding tasks, click Send Notifications and send the notification(s) on the newly created/updated tasks. Note: think of this screen like an edit mode, you can make multiple changes without sending multiple notifications. This is intentionally not an automated step so the PM is in full control of sending only the latest notification(s) of add(s) or change(s) to the assignee(s).

Task name		
Added task		
Assignee		
Cory Belden ×		
Start date		
05/16/2022		
End date		
05/16/2022		
Planned hours		
1 \$		
Actual hours		
Progress		
0%		
Description		
This task was added after the review was initially created		
💼 Delete	Save	O Cancel

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Revising Based on Review Comments

In a Template Review if you are the document developer you can edit the template as you receive review comments. See *Viewing and editing a CodySoft Editor Template*

Monitoring Reviews on the Reviews Tab

Use the Reviews tab to monitor review activity for both Template reviews and Version reviews.

- 1. From the Projects page, click the Reviews tab
- 2. Click either the Template reviews or the Version reviews tab to see the review activity for those stages of review.

Template Reviews	Version Reviews					
Review Sum	mary					
	-					
 Reviews in Prog 	jress					
Name	Template Type	Review Method	Review Round	Review Complet		: Mark Complete
SB Test Review 6-9-16	Base Template	Routing	1	0 / 1		Mark Complete
Reviews Completion	eted					
Review Tasł	s					
 Tasks - Active 	Reviews					
Ten	nplate Rev	view Round	Name	Start Date	End Date E	dit Method
SB Test Review	v 6-9-16	1 Te	st Review (5/16/2016 8,	/1/2016 <u>Edit</u>	: File
 Tasks - Comple 	ted Reviews					

The Review Summary Section displays for the owner that initiated the review. The Review Tasks sections displays for reviewers assigned to the review.

The Review Summary section shows Reviews in Progress and Reviews Completed

3. Click Mark Complete to mark a review as complete.

A confirmation message displays:

Confirm Mark Complete X				
There are reviews in progress. Markin complete will also set all in-progress complete.				
	Ok Cancel			

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Mark Complete completes every open task with 100% progress but keeps the actual hours at 0 hours so that the user knows which tasks were auto closed. Mark a review as complete when the review is over or when an additional review needs to replace the first review prior to the completion of that review.

The Review Tasks section displays reviews assigned to you.

You can mark a task as complete by selecting the checkbox at the end of the row for that task.

You can also go to the Tasks tab to see all Template review tasks assigned for this project.

Complete One Review and Start Another Review

• Once all review tasks are complete, click **Mark Complete** on the review summary screen to close out any open tasks. You can also click **Mark Complete** when you need to replace the first round of review with another regardless of whether previous reviews were completed. For example, if four out of five people have completed their reviews, and you have made updates to the template and are ready for another round of review, you can close the current review without waiting of the fifth person, and then give everyone including that person the opportunity to review the next round of updates.

Reviewing the Review

From the Template Review Summary page, click on the Review Name to see a summary of the review in progress:

Template Review Summary - SBTemplate50919 - Base Template

Return to Project
Download PDF with applied Markups
Download Notes CSV

Click **Download PDF with applied Markups** to see the marked-up document with all reviewers' markup applied and the reviewer's name below the comments that made.

Click **Download Notes CSV** to download a .CSV file of the comments in Excel format.

Closing or canceling tasks

As a project manager, you may encounter circumstances where you want to close or cancel a task that has been assigned. You take these actions on the Tasks tab:

1. Select a project

2. In the project, go to the Tasks tab. All tasks for the project display:

etails	Tasks	Discussion	s Rules	Templa	ates	Versions	Reviews	Attachmen	ts Compliance	e Analyze	
mport Tas	ks Export	Tasks To	File								
Month	Day Fulls	creen	elect Colun	าทร						Send Notifica	ations
	Assignee	# of Days	Progress	Status F	Planne	d Actual	🕂 Na09 Ma10	Ma11 Ma12 Ma13	Ma14 Ma15 Ma16 Ma17	7 Ma18 Ma19 Ma20 Ma2	1 Ma2
D	Al Valenti	3	100%	Complete	2h	0h	Product	team re			^
D	Cory Belde	3	100%	Complete	2h	1.25h	Product	team re			
D	Cory2 Beld	4	100%	Complete	3h	0h		Marketin	g Team Revie		
D	Cory Belde	4	100%	Complete	3h	1h		Marketin	g Team Revie		
		3	100%	Complete	3h	0.816	Me	dicare_2022_			
D	Cory Belde	3	100%	Complete	1h	0.416	Ма	arketing task			
		Assignee			Con	nplete Workl	oad 1/209 M210	Ma11 Ma12 Ma13	Ma14 Ma15 Ma16 Ma17	7 Ma18 Ma19 Ma20 Ma2	1 Ma2 ^
🗋 Co	ry Belden				7	0% 195.1	3333: 19.2°8.6		.52 0.271	.27 0.27 1.27 <mark>10.0</mark> 2	
🗋 Sa	urabh Sharm	a			4	5% 110	h	26.6'26.6'26	.67 10.00	10.00	

3. While you are editing the project, you can Delete tasks you no longer needed. To Delete, double click the task you would like to delete, the edit screen appears. Click Delete, a warning message appears. Click OK to Delete.

End date			
05/16/2022	Task will be delete are you		
Planned hours	arc you	Suice	
10	ок	Cancel	
Actual hours			
0			
Progress			
0%			
Description			
Sample Review Descrip	tion		
Complete	🗊 Delete	✓ Save	⊘ Cancel

Creating another round of review

When all tasks from a previous round of review are marked complete, then the review icon displays again on the Templates tab.

Click the Review icon to start another review. If the system detects that you have done a previous review, the 'Use Previous Round' radio button will appear but will not be selected by default.

Home Projects Rules	
	Create from
	New Review O Use Previous Round
Template Review - 2	Task name
Edit Method: O Edit File	New task
Plan Number: Base Templa	Assignee
Month Day Fullscreen S	Gelect
Assignee # of D	Start date

To use the previous round's assignments, select the Use Previous Round radio button, then click Save. The tasks and assignments from the previous round of review is loaded for the next review. You can then edit that information if needed.

Creating Rounds of Review of the Versioned Documents

The top tab of the reviews process is Reviews. You can conduct rounds of review on both the Template Reviews subtab (this will display by default) and the Version Reviews subtab (you will need to select this to see Version Reviews):

emplate Reviews Version Reviews									
eview Summary									
 Reviews in Progress Name 	Version Type	Review Method	Review Round	Created By		Reviews Complete		Mark Complete	
Medicare 2022 H1234 002 HMO Medicare									
Advantage Silver_EOC	H1234	Concurrent	1	Cory Belden	03/07/2022	0/4		<u>Mark</u> Complete	
	H1234	Concurrent	1	Belden	03/07/2022				
<u>Advantage Silver_EOC</u> <u>Medicare_2022_H1234_003_HMO_Medicare</u>	H1234 003 -	Concurrent	1 1 3	Belden Cory Belden		3/3		Complete Mark	

The Review Summary and Review tasks are headings on both the Template Reviews and Version Reviews tabs.

Creating a single version review

When you are ready to have your versioned project documents reviewed, you create review tasks and assign them to the appropriate reviewers just as in the Template review process (eligible Versions will have a magnifying glass to the right of them just as the Templates did).

etails	Tasks	Discussions	Rules	Templates	Versions	Reviews	Attachme	ents Compli	iance /	Analyze	e	
	ve Version se select	s the document(s)	for downloa	ıd								
	F	ile Name	Plan Number	Contract Number	Template# /Version	≠/RevDate n# View	Created By	Created On	Status			
*		\$	\$	\$		\$	\$	\$		\$	\$	\$
	02_HMO	<u>2022 H1234 0</u> Medicare Je Silver EOC	002	H1234	2_0415202	2_2	Cory Belden	04/15/2022	<u>Draft</u>	٢	÷	
	03_HMO	2022_H1234_0 Medicare ge Silver_EOC	003	H1234	2_0506202	2_3	Cory Belden	05/06/2022	<u>Draft</u>	٢	÷	
	02_HMO_	<u>2022 H1234 0</u> Medicare Je Silver EOC	002	H1234	2_0506202	2_4	Cory Belden	05/06/2022	<u>Draft</u>	٢	÷	
	02_HMO	<u>2022 H1234 0</u> Medicare Je Silver EOC	002	H1234	2_1001202	1_1	Attila Kozma	10/01/2021	<u>Draft</u>	٢	+	
	<u>H1234-0</u>	<u>)3</u>	003	H1234	5_0217202	2_3	Cory Belden	02/17/2022	<u>Draft</u>	٢	÷	Ø

The two differences between the Template review and Version Review processes are:

- In Version Reviews there is no option to edit the Base template, which has already been approved.
- You can send out multiple Versions for review at a time.

Creating a bulk version review

From the Versions tab select one or more Versions, a Bulk Review button shows up. Click Bulk Review.

Ch	nange document(s) status	to:		Bulk Review		Download	selected do	ocum	ent(s	5)
Can	ncelled	~		1		Original Form	at			~
	File Name	Plan Number	Contract Numb	Template#/RevDate /Version# View	Created By	Created On	Status			
*	\$	\$	\$	\$	\$	\$	\$	Ŷ	¢	\$
	Medicare_2022_H1234_0 02_HMO_Medicare Advantage_Silver_EOC	002	H1234	2_04152022_2	Cory Belden	04/15/2022	<u>Draft</u>	٩	+	
	Medicare_2022_H1234_0 03_HMO_Medicare Advantage_Silver_E01	003	H1234	2_05062022_3	Cory Belden	05/06/2022	<u>Draft</u>	٢	+	
	Medicare_2022_H2234_0 02_HMO_Medicare Advantage_oliver_EOC	002	H1234	2_05062022_4	Cory Belden	05/06/2022	<u>Draft</u>	٢	+	
	Medicare 2022_H1234_0 02_VMO_Medicare Advantage_Silver_EOC	002	H1234	2_10012021_1	Attila Kozma	10/01/2021	<u>Draft</u>	٩	+	
	<u>H1234-003</u>	003	H1234	5_02172022_3	Cory Belden	02/17/2022	<u>Draft</u>	٢	+	
	H1234-002	002	L1004	E 00170000 /	Cory	02/17/2022	Draft	ത		

All Versions must be in Draft status and have no in progress reviews open. If either of these conditions are not met, you will receive an error message:

Cannot Review!	×
One or more of the selected versions are no	t reviewable.
	ОК

From here, the steps to create the review are the same as single template reviews, the only difference is the tasks you assign here will be sent out for each Version you select. For example, if you select 4 Versions to send out for review, and have 5 assignees, the system will create those 5 tasks, for those 4 Versions for a total of 20 tasks.

Testing, Approving, Declining, and Cancelling the CodySoft[®] Template

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

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

Test Template		×
Plan Number	001(H1234)	~
Туре	Word	~
Entire Document	○ Yes ● No	
Start Page *	01	
End Page *	277	
		Ok Cancel

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

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

- 3. Select the type of output you would like, either a Word file or a PDF.
- 4. Select Yes to test the entire document. If you select Yes, the page range fields are hidden.

- 5. Select No to specify a page range to test
 - a. Enter a Start page
 - b. Enter an End page
- 6. Click **OK.** The Template Testing dialog box opens.
- 7. Click **Preview.** A plan-specific version is displayed as a PDF or MS Word document in the lower-left corner of the template editor screen. You can open or download this test the template file.

	Home Projects Rules Library Inventory Reports Archives S Untock entities Project - 644, Template - TestAspose101519	earch Regulatory Rules Admin	Welcons Stephen Billias clamm that Loodit
	▲ 1 of 283 ▶ 100 % - Q Q	Search Elements Q M 1 M [[Plan_Name]] [[Plan_Type]]	+ Add Rule Search Rules Q SBTestFive53019 SBTestFive53019 SBTestFive53019
	Evidence of Coverage: Your Medicare Health Benefits and Services and Prescription Drug Coverage as a Member of [[Plan_Name]] [[Plan_Type]]	[[MAO]] [[IF:Ruleid= {SBTestAltianguageone}]] [[EOC_Material_ID]]	StephenTestFour53019
b.	(Optimil: invertend/sizer_nome) (Optimil: invertend/sizer_nome) (Optimil: invertend/sizer_nome) This bookste gives you the doubling of the optimiliant of the optimiliant overage from January 1 - Docember 9, 2000, it explains how to get everage for the boath met services and prescription drugs you need. This is an important legal document. Please leave it in a staff party.		
Medicare 2020	This plan, [[Fun, Xane]], is offered by [[MA00], [WAb this & before of Converge says "we", "un," of "one", it means [[MA01], Wab is any "plan" of "our plan," it means [[Fun, Xane]].) Recert Federal contracting statement [[IF:Radelds:[SBT:ert.Aitanguagesner]]]		

NOTE: If you have Track Changes turned on in your Word template, the system treats them as Accepted in the preview file.

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

Template testing	1	×
Template testing f failed.	or Test 2 Page	eSplitter is
Error message: P found in Applies D ANOC-EOC Rules ASPOSEP2RxIC0	ata Asset AS Grid. Rule:	· · ·
	Ok	Download

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

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

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

Approving a template

Once all review tasks have been completed and the template updated, then you want to mark the template as Approved to move to the Version stage.

When document versions have been reviewed and edited based on review comments, you are ready to obtain final approvals on the documents.

1. On the Templates tab, click the filename. The Edit Templates screen displays:

Template - SB Test5-26-16

Unlock Template and	Unlock Template and return to Project atus Approval Pending	
Status	Approval Pending	¥
Approval Method	Concurrent	v
File url	_EOC 50	

- 2. Change the Status to Approval Pending
- 3. Identify the Approval Method, either Concurrent or Routing
- 4. Select approvers from the list:

Available approvers	Selected approvers	
Jason Dempsey		
Kathy Drake		
TinaR Hicks		
KD Drake		
Tina RHicks		
Alphonse Valenti		
KathyD Drake		
Taras Ilyin		
Brian Yavorsky		
Denys Dou		

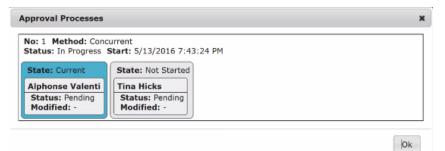
5. Click **OK**. The document now displays as Approval Pending on the Templates tab:

tails	Tasks Discus	ssions Rules	Templates Versi	ions Reviews	Attachments	Compliance	Analy	ze
d Temp	late							
Acti	ve Templates							
	ite remplaces							
No		Туре	Status	Created On	Updated By	Last Updated		
		Type CodySoft Editor	Status Approved	Created On 05/16/2016	Updated By Stephen Billias	Last Updated)
	Name						🥪 <	9) 9)

NOTE: You cannot edit a document in Approval Pending status. If you try to Edit Version, you receive a message:

"Version can't be edited while in Pending approval status".

6. Click the link in the Status column of a template to see the Approval Process status dialog:



When all reviewers have approved the template:

- 1. From the templates tab, click the template name
- 2. Change the Status to Approved
- 3. Change the Approval Method to the method used, either Routing or Concurrent
- 4. Click Commit Changes
- 5. The Create Versions icon for creating Versions appears on the template row

Activ	e Templates							
No	Name	Туре	Status	Created On	Updated By	Last Updated		
1	TestEOC1c	CodySoft Editor	Approved	05/16/2016	Stephen Billias	05/25/2016	a	٦
2	<u>SB Test 5-23-16</u>	CodySoft Editor	Approved	05/23/2016	Stephen Billias	05/25/2016		

Declining a Template

If you are an approver and you want to reject a template:

- 1. From the Templates tab, click the **template name**.
- 2. Click Decline.
- 3. Add a comment why you are declining the version
- 4. Click OK

The template is returned to Draft status. Click the Status column on the Templates tab to see Approval Processes dialog box that provides information on the approval process.

Cancelling a Template

To cancel a template that is in draft status:

- 1. In the project record, click the **Templates** tab.
- 2. Click the name of the template you would like to approve.
- 3. For "File" or "Excel" templates, Click Edit
- 4. From the Status drop-down list, select Cancelled.
- 5. Click Commit Changes.
- 6. Click the **Project** link to return to the project record.

NOTE: Active and Cancelled templates are displayed in separate area of the Templates tab. Cancelled templates are hidden unless you click the down arrow next to the Cancelled Templates label.

Home	Projects	Rules	Library	Inventory	Reports	Archives	Search Regulatory Rules	Admin
New Rule	e Rules	Search F	Rules					

emplates							
Name	Туре	Status	Created On	Updated By	Last Updated		
t Approve template	CodySoft Editor	Approved	04/01/2016	Stephen Billias	04/01/2016	🥪 🛛	D
		Name Type	Name Type Status	Name Type Status Created On	Name Type Status Created On Updated By	Name Type Status Created On Updated By Last Updated	Name Type Status Created On Updated By Last Updated

	Management module				Revisions				
lome	Projects Rules	Library Im	ventory Repo	rts Archives S	Version	Updated By		Updated On	
					Revision 3	Stephen Billias	04/10	0/2018	
					Revision 2	Stephen Billias	04/10	0/2018	
					Revision 1	Stephen Billias	04/10	0/2018	
roject	229 - SBTest71517	-1 InProg	ress						
				Copy proj					
Details	Tasks Discus	sions Ru	les Templa	tes Versions					
Add Temp	alate								
	tive Templates								
* Act			Concernant of the	The second second second second second					
• Act	Name	Туре	Status	Created On					
	Name SBTest71517	- 10 march 1		Created On 7/15/2017					
No 1		- 10 march 1		Contraction of the					Ok
No 1	SBTest71517	- 10 march 1		Contraction of the	Updated By	Last Updated			Ok
No 1 * Can	SBTest71517	File	<u>Draft</u> 0	7/15/2017	Updated By Stephen Billias	Last Updated 04/10/2018			Ok

You can view a history of revisions on Cancelled templates just as you can with Active templates:

- 1. Click the plus sign (+) on the row for the cancelled template.
- 2. Click the revision number of the revision you want to open.

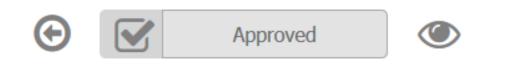
NOTE: You can save the earlier cancelled revision locally after you open it in MS Word.

Reverting a Template to Draft Status

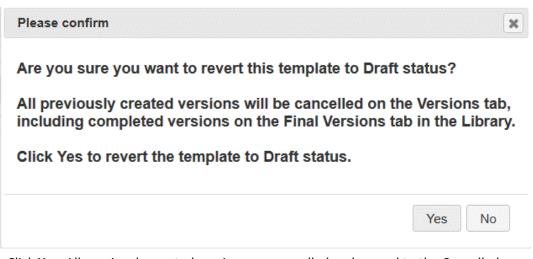
If you need to make additional changes to an Approved template to create updated versions, you can revert the template to Draft status.

To revert an approved template back to draft status:

- 1. In the project record, click the **Templates** tab.
- 2. Click the name of the Approved template you would like to revert to Draft status.
- 3. On the Template Editor screen, click the template status indicator:



4. Select **Draft**. A confirmation message displays:



5. Click **Yes**. All previously created versions are cancelled and moved to the Cancelled versions area on the Versions tab. Any Completed versions are also removed from the Final Versions tab in the Library. You can make additional edits to the template and reapprove it to make new versions.

Working with Versions

Version Naming Convention

CodySoft[®] uses fields from the completed Project Record to generate file names for versions created from approved templates.

Although the version naming convention is partly based on CMS requirements, it can be used for other plan (and non-plan) types (for example, Medicaid, commercial, member services department).

The version name includes the following parts:

- MCE or Contract # (or another identifier; for example, department name, Medicaid, etc.)
- Plan # (or another identifier; for example, NA)
- Media type
- CodySoft project #

Medicare projects only:

- CMS disposition type
- CMS approval date (once approved)

The following information is available on the Versions tab, for version control purposes:

- Template #
- Rev date (MM_YY)

Version #

NOTE: Cody also provides a method for custom naming versions. See the information in the section on creating versions for the different template types.

Creating a version from a File Template (MCE Projects)

Versions are created from approved Word and File templates only. See *Approving a template*. **Excel Templates cannot be versioned. If you have an Excel template that needs to be versioned after it has been finalized, upload the final template version as a "file" template.**

- 1. In the project record, click the **Templates** tab.
- Click the Create Version icon Solution of the template for which you would like to create a version. A Control Version is created. This creates a placeholder for your CMS Submission version of the document you have created. This placeholder is used for CMS submission and approval. Once the Control Version is created, you can create placeholders for your market versions.
- 3. Click the **Create Version** icon 🦻. The Choose your naming reference dialogue displays:

Choose දිපිහා naming preference	×
CodySoft Version Naming (LOB_PlanYear_ContractNum_PlanNum_PlanSubType_PlanName_MediaType, for example: Medicare_2020_H1234_001_PPO_Medicare PPO RXPlus_EOC)	
Custom Version Naming (Create a file name from the associated published data asset)	

ок	Cancel	
		1.

a. Select CodySoft Version Naming to use Cody's standard naming convention. The **Add Version** dialogue displays:

Plan Number	All

- ii. ii. If a version is to be created for all plan numbers, select **All** from the drop-down list.
- iii. Click OK.

list.

b. Select Custom Version Naming to create a unique name based on the associated data asset. The Custom Version Naming Option dialogue displays:

Custom Version Naming Option	×
▼ 1. Select The Data Asset	
Category Data Name	Asset name
 <u>10-18 Demo Benefit Grid</u> <u>10-18 Demo Operational Grid</u> <u>11-4 DSNP EOC Rules Grid</u> <u>2017 Asset Application Grid</u> <u>ANOC Rules Grid</u> <u>ANOC Rules Grid</u> <u>Anthem Rules Grid</u> Anthem_12_1_17 Anthem_12_1_17_test Anthem_12_1_17_test2 <u>ASPOSE Testing ANOC-EOC Rules Grid</u> <u>Astronomication</u> 	
▶ 2. Select The Asset Attribute	
▶ 3. Select The Plan	
Summary	

- i. Select the data asset associated with this plan or plans.
- ii. Click Next

iii. Select the Asset Attribute and Variant to use as part of the custom name.

Custom Version Naming Option	×
▶ 1. Select The Data Asset	
▼ 2. Select The Asset Attribute	
Filter: Variation: 2017 v	^
○ Plan_ID ○ Custom_Name ○ Plan_Type	11
O State O Service_area	
O Phone O TTY O MAO	
O of_Ohio	~
Previous	ext
▶ 3. Select The Plan	
► Summary	

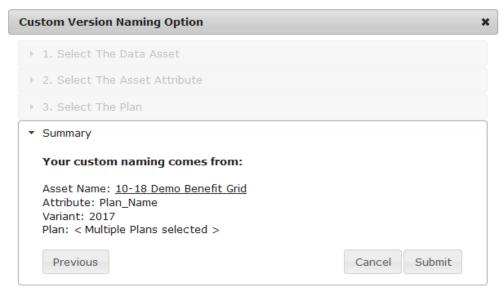
- iv. Click Next to continue or **Previous** if you need to go back to the Data Asset choice
- v. Select the plan from the dropdown list:

Cus	tom Version Naming Option	
Þ	1. Select The Data Asset	
÷	2. Select The Asset Attribute	
-	3. Select The Plan	
	4 selected 💌	
	Filter: Enter keywords	Next
	✓ Check all X Uncheck all Ø	Next
Þ	Medicare Advantage Gold - H1234 - 001	
	Medicare Advantage Silver - H1234 - 002	
	Medicare Advantage Silver - H1234 - 003	
	Medicare Avantage Bronze - H1234 - 004	

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- vi. Click **Next** to continue or **Previous** if you need to go back to the Asset Attribute and Variant choice
- vii. Review your selections:



viii. Click **Submit** to confirm your selections and begin the Versioning process, or click **Cancel** to start over or **Previous** to return to the Select Plan choice.

NOTE: CodySoft checks to see if your standard or custom version name contains special characters that are not allowed because they cause errors when exporting the files, and displays an error message when they are encountered when you click Submit:

For standard file naming:



Special characters were detected in your version name(s).These characters will be replaced in the file name with underscores(_).Click OK to proceed with version creation, or click Cancel to make changes to your file.

Ok Cancel

If your standard or custom version name contains any special characters, you have two options:

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- Click OK to proceed with version creation. The special characters will be replaced with underscores in your file name(s).
- b. Click **Cancel** to make changes to your file before creating versions.
- 4. Click the Versions tab to access the newly created version(s) placeholder(s).
- 5. Download versions as needed. See Downloading Versions.

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

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

You receive a notification when versions are created. If any versions fail, you receive a notification identifying plan numbers and the reasons the versions failed.

Creating a version from a File Template (Non-MCE Projects)

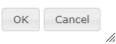
Versions are created from approved Word and File templates only. See *Approving a template*. Excel Templates cannot be versioned. If you have an Excel template that needs to be versioned after it has been finalized, upload the final template version as a "file" template.

- 1. In the project record, click the **Templates** tab.
- 2. Click the **Create Version** icon 🦃. The Choose your naming reference dialogue displays:

Choose

CodySoft Version Naming
 (LOB_PlanYear_ContractNum_PlanNum_PlanSubType_PlanName_MediaType, for example:
 Medicare_2020_H1234_001_PPO_Medicare PPO RXPlus_EOC)

Custom Version Naming (Create a file name from the associated published data asset)



×

a. Select CodySoft Version Naming to use Cody's standard naming convention. The **Add Version** dialogue displays:

lan Number	All	v

- ii. ii. If a version is to be created for all plan numbers, select **All** from the drop-down list.
- iii. Click OK.

list.

b. Select Custom Version Naming to create a unique name based on the associated data asset. The Custom Version Naming Option dialogue displays:

Custom Version Naming Option			×
▼ 1. Select The Data Asset			
Category Data	Name	Asset name	
 10-18 Demo Benefit Grid 10-18 Demo Operational G 11-4 DSNP EOC Rules Grid 2017 Asset Application Grid ANOC Rules Grid Anthem Rules Grid Anthem_12_1_17 Anthem_12_1_17_test Anthem_12_1_17_test2 ASPOSE Testing ANOC-EOC Asset Application 	1		•
▶ 2. Select The Asset Attribute			
▶ 3. Select The Plan			
▶ Summary			
			11.

- i. Select the data asset associated with this plan or plans
- ii. Click Next

iii. Select the Asset Attribute and Variant to use as part of the custom name.

Custom Version Naming Option	×
▶ 1. Select The Data Asset	
▼ 2. Select The Asset Attribute	
Filter: Variation: 2017 Variation: Variation: 2017 Variation: 2017 Variation:	
● Plan_Name ○ Plan_ID	^
O Custom_Name	
○ Plan_Type ○ State	
O Service_area O Phone	
Оттү	
O MAO O of_Ohio	
	~
Previous	Next
▶ 3. Select The Plan	
> Summary	

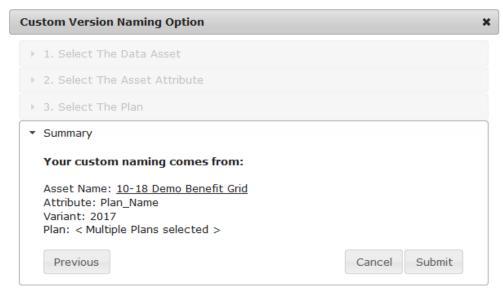
- iv. Click **Next** to continue or **Previous** if you need to go back to the Data Asset choice
- v. Select the plan from the dropdown list:

Cus	tom Version Naming Option	د
Þ	1. Select The Data Asset	
Þ	2. Select The Asset Attribute	
-	3. Select The Plan	
	4 selected 💌	
	Filter: Enter keywords	Next
	✓ Check all X Uncheck all 🛛 🕄	Next
÷	Medicare Advantage Gold - H1234 - 001	
	Medicare Advantage Silver - H1234 - 002	
	☑ Medicare Advantage Silver - H1234 - 003	
	Medicare Avantage Bronze -	

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- vi. Click **Next** to continue or **Previous** if you need to go back to the Asset Attribute and Variant choice
- vii. Review your selections:

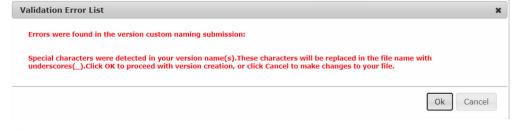


viii. Click **Submit** to confirm your selections and begin the Versioning process, or click **Cancel** to start over or **Previous** to return to the Select Plan choice.

NOTE: CodySoft checks to see if your standard or custom version name contains special characters that are not allowed because they cause errors when exporting the files, and displays an error message when they are encountered when you click Submit:

For standard file naming:





If your standard or custom version name contains any special characters, you have two options:

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- Click OK to proceed with version creation. The special characters will be replaced with underscores in your file name(s).
- b. Click **Cancel** to make changes to your file before creating versions.
- 3. Click the Versions tab to access the newly created version(s) placeholder(s).
- 4. Download versions as needed. See Downloading Versions

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

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

Creating a version from a CodySoft[®] Editor Template (MCE Projects)

Versions are created from approved Word and File templates only. See *Approving a template*. Excel Templates cannot be versioned. If you have an Excel template that needs to be versioned after it has been finalized, upload the final template version as a "file" template.

- 1. In the project record, click the **Templates** tab.
- 2. Click the **Create Version** icon 🕏 of the template for which you would like to create a version.
- 3. A **Control Version** is created. This creates a placeholder for your CMS Submission version of the document you have created. This placeholder is used for CMS submission and approval. Once the Control Version is created, you can create placeholders for your market versions.
- 4. Click the **Create Version** icon 🦃. The Choose your naming reference dialogue displays:

Choose 팬 ur naming preference	×
CodySoft Version Naming (LOB_PlanYear_ContractNum_PlanNum_PlanSubType_PlanName_MediaT Medicare_2020_H1234_001_PPO_Medicare PPO RXPlus_EOC)	ype, for example:
Custom Version Naming (Create a file name from the associated published data asset)	
	OK Cancel

a. Select CodySoft Version Naming to use Cody's standard naming convention. The **Add Version** dialogue displays:

Add Version		
Plan Number	All	*
		Ok Cancel

- ii. ii. If a version is to be created for all plan numbers, select **All** from the drop-down list.
- iii. Click OK.

list.

b. Select Custom Version Naming to create a unique name based on the associated data asset. The Custom version Naming Option dialogue displays:

Custon	n Version Naming Opti	on		×
* 1.9	Select The Data Asset			
Cat	egory Data	Name	Asset name	
	10-18 Demo Benefit Gri 10-18 Demo Operationa 11-4 DSNP EOC Rules G 2017 Asset Application G ANOC Rules Grid Anthem Rules Grid Anthem_12_1_17 Anthem_12_1_17_test Anthem_12_1_17_test Aspose Testing ANOC-E	<u>I Grid</u> Grid Grid		•
→ 2.5	Select The Asset Attribute	e		
→ 3. S	Select The Plan			
→ Sun	nmary			
				11.

- i. Select the data asset associated with this plan or plans.
- ii. Click Next.

iii. Select the Asset Attribute and Variant to use as part of the custom

name.

Custom Version Naming Option	×
▶ 1. Select The Data Asset	
▼ 2. Select The Asset Attribute	
Filter: Variation: 2017 ~ Plan_Name Plan_ID Custom_Name Plan_Type State State Service_area Phone TTY MAO of_Ohio revious	▲ ✓ Next
▶ 3. Select The Plan	
▶ Summary	

- iv. Click **Next** to continue or **Previous** if you need to go back to the Data Asset choice
- v. Select the plan from the dropdown list:

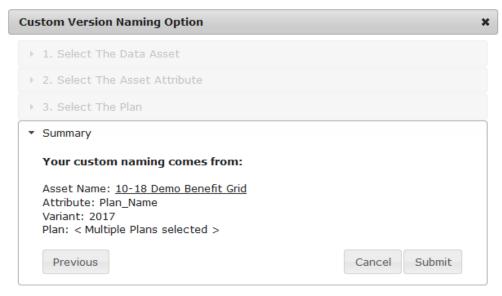
Cus	tom Version Naming Option	:
Þ	1. Select The Data Asset	
ŀ	2. Select The Asset Attribute	
-	3. Select The Plan	
	4 selected 🔹	_
	Filter: Enter keywords	Next
	✓ Check all X Uncheck all Ø	Next
ŀ	Medicare Advantage Gold - H1234 - 001	
	Medicare Advantage Silver - H1234 - 002	
	Medicare Advantage Silver - H1234 - 003	
	✓ Medicare Avantage Bronze - H1234 - 004	

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- vi. Click **Next** to continue or **Previous** if you need to go back to the Asset Attribute and Variant choice
- vii. Review your selections:



viii. Click **Submit** to confirm your selections and begin the Versioning process, or click **Cancel** to start over or **Previous** to return to the Select Plan choice.

NOTE: CodySoft checks to see if your standard or custom version name contains special characters that are not allowed because they cause errors when exporting the files, and displays an error message when they are encountered when you click Submit:

For standard file naming:





If your standard or custom version name contains any special characters, you have two options:

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- Click OK to proceed with version creation. The special characters will be replaced with underscores in your file name(s).
- b. Click **Cancel** to make changes to your file before creating versions.
- 5. Click the Versions tab to access the newly created data-merged version.
- 6. Download versions as needed. See Downloading Versions.

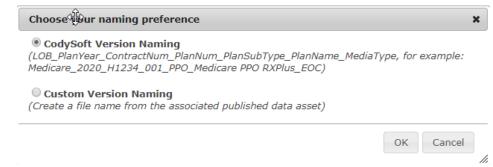
NOTE: CodySoft removes blank rows and end of row paragraph marks in all tables in your documents as part of the Versioning process.

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

You receive a notification when versions are created. If any versions fail, you receive a notification identifying the reason the version failed.

Creating a version from a CodySoft[®] Editor Template (Non-MCE Projects)

- Versions are created from approved CodySoft[®] Editor and File templates only. See Approving a template. Excel Templates cannot be versioned. If you have an Excel template that needs to be versioned after it has been finalized, upload the final template version as a "file" template.
- 2. In the project record, click the **Templates** tab.
- 3. Click the **Create Version** icon 🦻 . Click the **Create Version** icon 🕏 . The Choose your naming reference dialogue displays:



c. Select CodySoft Version Naming to use Cody's standard naming convention. The **Add Version** dialogue displays:

Plan Number	All

- ii. ii. If a version is to be created for all plan numbers, select **All** from the drop-down list.
- iii. Click OK.

list.

c. Select Custom Version Naming to create a unique name based on the associated data asset. The Custom Version Naming Option dialogue displays:

Custom Version Naming Option			×
▼ 1. Select The Data Asset			
Category Data	Name	Asset name	
 <u>10-18 Demo Benefit Grid</u> <u>10-18 Demo Operational Grid</u> <u>11-4 DSNP EOC Rules Grid</u> <u>2017 Asset Application Grid</u> <u>ANOC Rules Grid</u> <u>ANOC Rules Grid</u> <u>Anthem Rules Grid</u> <u>Anthem 12_1_17</u> Anthem_12_1_17_test <u>Anthem 12_1_17_test2</u> <u>ASPOSE Testing ANOC-EOC Rules</u> <u>Astronomication</u> 	Grid		•
▶ 2. Select The Asset Attribute			
▶ 3. Select The Plan			
> Summary			
			1.

- i. Select the data asset associated with this plan or plans
- ii. Click Next

i. Select the Asset Attribute and Variant to use as part of the custom

name.

Custom Version Naming Option	×
▶ 1. Select The Data Asset	
▼ 2. Select The Asset Attribute	
Filter: Variation: 2017 ~ Plan_Name Plan_ID Custom_Name Plan_Type State State Service_area Phone TTY MAO of_Ohio Previous	► ► Next
▶ 3. Select The Plan	
▶ Summary	

- ii. Click **Next** to continue or **Previous** if you need to go back to the Data Asset choice
- iii. Select the plan from the dropdown list:

Cus	stom Version Naming Option	
Þ	1. Select The Data Asset	
Þ	2. Select The Asset Attribute	
•	3. Select The Plan	
	4 selected 🔹	
	Filter: Enter keywords	Next
	✓ Check all X Uncheck all Ø	Next
Þ	Medicare Advantage Gold - H1234 - 001	
	Medicare Advantage Silver - H1234 - 002	
	Medicare Advantage Silver - H1234 - 003	
	Medicare Avantage Bronze - H1234 - 004	

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11.

- iv. Click **Next** to continue or **Previous** if you need to go back to the Asset Attribute and Variant choice
- v. Review your selections:

Custom Version Naming Option	×
▶ 1. Select The Data Asset	
▶ 2. Select The Asset Attribute	
▶ 3. Select The Plan	
- Summary	
Your custom naming comes from:	
Asset Name: <u>10-18 Demo Benefit Grid</u> Attribute: Plan_Name Variant: 2017 Plan: < Multiple Plans selected >	
Previous	Cancel Submit

- vi. Click **Submit** to confirm your selections and begin the Versioning process, or click **Cancel** to start over or **Previous** to return to the Select Plan choice.
- 6. Click the Versions tab to access the newly created data-merged version.
- 7. Download versions as needed. See Downloading Versions.

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

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

8. Review your selections and click Submit.

NOTE: CodySoft checks to see if your standard or custom version name contains special characters that are not allowed because they cause errors when exporting the files, and displays an error message when they are encountered when you click Submit:

For standard file naming:

Validation Error List

Errors were found in the naming submission:

Special characters were detected in your version name(s). These characters will be replaced in the file name with underscores (_). Click OK to proceed with version creation, or click Cancel to make changes to your file.

For custom file naming:

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×

Ok Cancel

alidation Error List	
Errors were found in the version custom naming submission:	
Special characters were detected in your version name(s).These ch underscores(_).Click OK to proceed with version creation, or click (

If your standard or custom version name contains any special characters, you have two options:

- a. Click **OK** to proceed with version creation. The special characters will be replaced with underscores in your file name(s).
- b. Click Cancel to make changes to your file before creating versions.

You receive a notification when versions are created. If any versions fail, you receive a notification identifying the reason the version failed.

Editing a Version

You can edit versions you have created. The list of versioned documents displays on the Versions tab:

Ą	F 2								Admin		Logof	
ollateral	Manageme mod	nt ule®								Sea	rch P	roje
łome	Projects	Rules Librar	y Inventory	Reports A	Archives Search Re	egulator	y Rules A	dmin				
roject 6	644 - Step	hen Test5091	9 In Prog	ress								
					Copy project	Cancel	l Project	Complete	On Hold	E	xit	
Details	Tasks	Discussions	Rules	Templates	Versions Revie	ews	Attachmer	nts Complia	ance A	nalyze	•	
	ve Version se select	s the document(s) for downlo	bad								
	se select		s) for downlo Plan Number	Contract Number	Template#/Re /Version# V		Created By	Created On	Status			
Plea	se select	the document(Plan	Contract				Created On	Status] \$	\$	\$
Plea	F Medicare	the document(Plan Number	Contract		iew		Created On 03/03/2020	Status Draft) \$	÷	
Plea	Medicare 01 HMO Advanta Medicare Advanta 017 HMO POS_Amo	the document(ile Name <u>2020 H1234</u> <u>Medicare</u> <u>ge Gold EOC</u>	Plan Number 0 001 0 017	Contract Number	/Version# V	iew	By Cory				_	¢
Plea	Medicare Advantar 01_HMO. Advantar 017_HMC POS_Am (HMO-PC Medicare 00_HMO:	the document(ile Name <u>2020 H1234</u> <u>Medicare</u> <u>ge Gold EOC</u> <u>t</u> <u>ge 2020 H324</u> <u>2-</u> <u>envantage ESR</u>	Plan Number ↓ 001 001 017 100	Contract Number	/Version# V	iew <	By Cory Belden Stephen	03/03/2020	Draft		÷	
Plea	Medicare 01 HMO Advanta Medicare Advanta 017 HMO 017 HMO 00 HMO Advanta 00 Amo Advanta Medicare	the document(ile Name 	Plan Number ↓	Contract Number H1234 H3240 H1234	/Version# V	iew 01	By Cory Belden Stephen Billias Stephen	03/03/2020	Draft Draft		+	

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1. Click the name of any document in the File Name column. The Edit Version dialog box displays:

Edit Version	×
Generic name	3_05282020_2
Status	Draft
Plan number	004
File name	Medicare_2020_H1234_004_HMO_Medicare Avantage Bronze_EOC
Edit Version	
	OK Cancel

2. Click Edit Version.

3. Edit and save your file. Your changes are included in the version and Tables of Contents (TOCs) in the document are updated automatically as needed based on the changes you made.

Approving or Declining a Version

Obtaining Final Approval

When document versions have been reviewed and edited based on review comments, you are ready to obtain final approvals on the documents.

1. On the Versions tab, click the filename. The Edit Version dialog box displays:

Edit Version				
Generic name	1_05132016_1			
Status	Approval Pending	*		
Approval Method	None	¥		
Plan number	002			
File name	H1234_002_EOC_48			
Edit Version				
			Ok	Cancel

- 2. Change the Status to Approval Pending
- 3. Identify the Approval Method, either Concurrent or Routing
- 4. Select approvers from the list:

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

- Activ	ve Version	S								
	File Name			Plan Number	Contract Number	Template#/RevDate /Version# View	Status			
H12	234 002 E	OC 48		002	H1234	1 05132016 1	ApprovalPending	۲		
H12	234 002 E	OC 48		002	H1234	1 05132016 2	Draft	•	+	

NOTE: You cannot edit a document in Approval Pending status. If you try to Edit Version, you receive a message:

"Version can't be edited while in Pending approval status".

6. Click the link in the Status column of a template to see the Approval Process status dialog:

No: 1 Method: Con	current	
Status: In Progress	Start: 5/13/2016 7:43:24 PM	
State: Current	State: Not Started	
Alphonse Valenti	Tina Hicks	
Status: Pending	Status: Pending	
Modified: -	Modified: -	

When all the approval tasks are completed and signed off, the version is complete and ready for approval.

Approver Notification

If you are an approver, you receive a notification message for approval of the version:



1. Click the Version link to access the version. The Edit Version dialog displays:

Edit Version		×
Generic name	1_09282019_10	^
Status	Draft	
Approval Method *	Routing	
Plan number	000	
File name	Medicare_2020_H1234_000_HMO_Cory TEST Plan_AFOR	
	<u>Approve</u> <u>Decline</u>	
		÷
	OK Cancel	

2. Click Approve. The status updates from Approval Pending to Approved in the versions list, and the shield icon is displays on the version row:

m Antii	ve Version								
ACU	ve version:	·							
		File Name	Plan Number	Contract Number		#/RevDate on# View	Status		
<u>H12</u>	234 002 E	OC 48	002	H1234	1 05132016	1	Approved 🤇) ®	+
H12	234 002 E	OC 48	002	H1234	1_05132016_	2	Draft	120	+ 🔎

Create a Compliance Record

Follow the steps to complete the approval of the version by creating a Compliance record.

- 1. Click the shield icon 🤎 on an approved version to create a Compliance record
- 2. Select the Compliance Type from the drop-down list
- 3. Select the Submission Type from the drop-down list

- 4. Enter the Submission Date
- 5. Click OK
- 6. On the Compliance tab:
 - a. Click the File Name of the document for which you want to create a compliance record
 - b. Enter the Disposition Date
 - c. Change the Status to CMS Approved
 - d. Click OK
- 7. On the Versions tab:
 - a. Click the File Name
 - b. From the drop-down list in the Status field, change the Status to Complete. The document is published to the Final Version list in the Library as a completed Compliance Record.

Declining a Version

To decline a version:

- 1. Click the filename from Review tab
- 2. Click Decline
- 3. Add a comment why you are declining the version
- 4. Click OK

After you decline the version, the version shows as declined with a discussion icon. Click the discussion icon to see the comment.

Details	Tasks	Discussions	Rules	Templates	Versions	Review	s Att	achments	Complia	nce Analyze	
Add Discus			D	scussion	Dana		Chatura	# of Con		Lest Hedeted	
	Title		U	scussion	Parer	птуре	Status	# of Con	iments	Last Updated	
<u>SB Test</u>	SB Test 5-23-16 declined		SB Test 5-23-16 declined		Project		Open	1		05/25/2016	

The version is returned to Draft status. Click the Status column on the Versions tab to see Approval Processes dialog box that provides information on the approval process.

tatus: Declined Start: 5/25	5/2016 1:00:47 PM Finish: 5/25/2016 1:44:33 PM	1
State: Failed	State: Not Started	
Brian Yavorsky	Stephen Billias	
Status: Declined	Status: Pending	
Modified: 5/25/2016 1:44:	33 PM Modified: -	
		Ok

uide. nply with applicable federal regulations.

Downloading Versions

1. You can download multiple versions at one time. From the home page of an individual project, select the **Versions** tab. The Versions tab lists all active versions that have been generated:

Project 5	677 - SBTE	EST 9-6-18	In Progres	s							
					Copy proje	Cance	el Project	Complete	On Hold	Exit	Sav
Details	Tasks	Discussions	Rules	Templates	Versions	Reviews	Attachmer	ts Complia	nce Ana	alyze	
▼ Activ	ve Versions	\$									
Plea	se select t	the document(s) for downlo	bad							
	Fi	le Name	Plan Number	Contract Number		e#/RevDate ion# View	Created By	Created On	Status		
*		<	¢ [<			\$ \$	\$
	<u>H1234 00</u>	04 ANO 577	004	H1234	1_11082	018_1	Stephen Billias	11/08/2018	<u>Draft</u>	•	
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	MDCR001 0 577	MDCR001 AN	MDCR001	MDCR001	1_11082	018_11	Stephen Billias	11/08/2018	<u>Draft</u>	•	۵
	<u>H1234 00</u>	02 ANO 577	002	H1234	1_11082	018_12	Stephen Billias	11/08/2018	<u>Draft</u>	•	۵
	<u>H1234 90</u>	00 ANO 577	900	H1234	1_11082	018_13	Stephen Billias	11/08/2018	<u>Draft</u>	•	۵

2. Select the checkbox in the upper left to select all plans for download, or select the checkboxes for the plans for which you want to download active versions. You can filter on any column, for example, File Name or Plan Number, to narrow your search for the plans you want to download. As soon as you make a selection, the Download Selected Document(s) button appears:

Activ	ve Versions								
						Download s	elected do	cumer	nt(s)
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*	<u></u>							\$	\$ \$
	H1234 004 ANO 577	004	H1234	1_11082018_1	Stephen Billias	11/08/2018	<u>Draft</u>	۵) (۵)	+ 🔎
	H1234 100 ANO 577	100	H1234	1_11082018_10	Stephen Billias	11/08/2018	<u>Draft</u>	۵)	+ 🔎
	MDCR001 MDCR001 AN 0 577	MDCR001	MDCR001	1_11082018_11	Stephen Billias	11/08/2018	<u>Draft</u>	۵)	+ 🔎

3. Select whether to download in original format, for example Microsoft Word, as PDF, or in both formats:

	ve Versions												
								D	ownload sele	cted d	ocum	ent(s	;)
								Origin	al Format				~
	File Name		Plan Number	Contract Number	Template#/RevDate /Version# View	Created By	Creat		al Format rt to PDF				
*		\$			<			Both					
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ck I	Download Selec	tec	d Docur	nent(s).	The standard de	ownload	d dial	og b	ох арреа	rs:			
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Open with	Windows Explorer (default	:)	~
○ <u>S</u> ave File			
Do this <u>a</u> uto	matically for files like this fr	om now on.	
		ОК	Cancel

5. Open or Save the file and click **OK**. Depending on your action, the Zip file opens or is saved to the Downloads folder.

NOTE that the Zip file name includes the project name and a date and time stamp to identify the download.

Also note that these documents are reparsed during the download process, and Tables of Contents (TOCs) are updated automatically.

Bulk Change Version Status

4.

You can change the status of versions on the Versions tab using the Change document(s) status dropdown.

1. Select one or more versions to change their status. The Change documents(s) status dropdown displays:

Ch	nange document(s) status t	:o:						Dowr	load selected do	ocument	(s)
Car	ncelled	`						Original F	ormat		`
Dra App	ft proved		in iber	Contract Number	Template#/RevDate /Version# View	Cr	reated By	Created On	Status		
Cor	mplete					<				: \$	¢
	ocelled 01_HMO_Medicare Advantage Gold_ANO	001		H1234	19_02032020_1		ohonse lenti	02/03/2020	<u>Draft</u>	٢	+
	Medicare_2020_H1234_0 01_HMO_Medicare Advantage_Gold_ANO	001		H1234	2_01012020_100		iurav Ighal	01/01/2020	<u>Draft</u>	٢	+
	Medicare_2020_H1234_0 02_HMO_Medicare Advantage_Silver_ANO	002		H1234	2_01012020_101		iurav nghal	01/01/2020	<u>Draft</u>	٢	+
	Medicare_2020_H1234_0 03_HMO_Medicare Advantage_Silver_ANO	003		H1234	2_01012020_102		iurav nghal	01/01/2020	<u>Draft</u>	٢	+
	Medicare_2020_H1234_0 01_HMO_Medicare Advantage Gold_ANO	001		H1234	2_01012020_103		iurav nghal	01/01/2020	Draft	٢	+

- 2. Select the new status from the dropdown list.
- 3. Click Change document(s) status to. A confirmation message displays, for example:

×

Version Status Bulk Update

You are about to update all selected items' status to: APPROVED

ОК	Cancel
----	--------

4. Click **OK**. The document(s) status changes.

NOTES:

- a) You cannot change a document from Draft to Complete status.
- b) You can change multiple versions in different statuses to a single new status.
 For example, you can change Approved and Complete versions back to Draft status using this dropdown.
- c) You can change Cancelled versions back to Draft status only, and only on Templates that haven't been cancelled.
- d) You cannot change a document to Pending Approval status using the bulk method. This choice is not available from the dropdown list because it requires routing for approval. To route a document for approval, use the standard method of approving a version. See *Approving a Version*.

Tasks and Traffic Management

Traffic Management Functions Roles and Responsibilities

Completing the Project Record (Traffic and Project Managers)

Once you submit a draft project record for review, the Traffic Manager is responsible for either approving the draft project request or for **assigning a Project Manager** to complete this task. To approve a draft project request, the Traffic Manager must complete all required project fields.

Your roles and responsibilities are defined in your profile by your administrator, the person who has admin rights to the CodySoft system. If you are the Traffic Manager responsible for approving new projects, or if you have been assigned as the Project Manager by the Traffic Manager, you are responsible for completing the **Project Record** in the Collateral Management Module[®].

The **Project Record** has several tabs. In the **Project Record**, you can upload files, create and review schedules, create documents and discussions, as well as track compliance and regulatory approvals.

To approve a draft project, complete any optional fields on the sub-tabs of the **Details** tab in the project record. All required fields are filled in at the time the project is created and are marked with a red asterisk (*).

The **Details** tab is divided into four sub-tabs:

- a. **Project Overview** Enter general information about your project, including project name and media type.
- b. **Project Services/Details** Specify requested services for your project.
- c. **Printing & Distribution** Identify the document specifications and print quantity as well as distribution instructions.
- d. **Requestor Info** –Include your contact information as well as budget and cost center information.
- 1. **Project Overview** Complete any optional information:
 - **Document Type** Indicate whether you are using a model document or creating a non-model document.
 - **Required/Optional** Capture whether the material you are creating is required or optional.
 - Job Number This is an auto-filled field with the project number.
 - Name Enter a specific name for your project (for example, "Classic Gold HMO MAPD direct mail for Nov seminars"). This field is populated when you fill out the initial Create Project fields and can be changed here.

- **PR Number** This is the number of the project request that preceded the Job Number (project number), which is no longer in use in CodySoft. The PR Number displays only for legacy projects.
- **Description** Enter specific details about your project (for example, "direct mail piece with BRC for Nov seminars").
- **MCE Project** If this material is to be submitted under your Multi-Contract Entity identifier (Y number), select this checkbox.
- Start Date Use the calendar widget to select the date the project starts.
- **Budget Estimate** Enter a preliminary budget number.
- **Budget Actual** When the project is complete, come back to this tab and enter the final budget amount in this field.
- **Regulatory Project Type** This is the project request's regulatory project type for purposes of regulation analysis. Select the appropriate project type from the pull-down menu.
- **Media type** Select your project's media type from the drop-down list (for example, *direct mail, EOC, ANOC, SB*).
- Line of Business Select the line of business from the drop-down list (for example *Medicare*).
- **Plan Types** Select the plan types from the drop-down list (for example, *Classic Gold HMO MAPD*).
- Sub Plan Types Select the sub-plan type (if applicable) from the drop-down list.
- **Plan Name/C#/ID**: From the drop-down list, select the checkboxes for the **contract numbers** that apply to this project.
- **Plan Year** Enter the plan year covered by the communication.
- **Expiration Date** Use the calendar widget to choose a project expiration date. Once this date has passed, all project information and associated documents are auto-archived.
- **Request date** This is the date you are submitting your request. It is an auto-generated field.
- **Due Date** Click the field's box for the calendar widget. Select the date in which you would like the project completed. Use the calendar's arrows to view days of future months.
- **Cost Center** If your company uses cost centers for accounting purposes, enter the appropriate cost center here.
- **Status** Displays the current status of the project.
- **PR Approver** This field displays the name of the person (either Traffic Manager or Project Manager) who approves the project.
- **Project Manager** Select the user responsible for managing the day-to-day details of this collateral material project from the drop-down list. This field must be populated before the project can be approved.
- Secondary Project Managers Select secondary project managers from the drop-down list. The Secondary PMs have the same access and responsibilities as

the primary project manager, in case a backup is needed or if two or more project managers need to share responsibility for a project.

- **Document developers** Select document developers from the drop-down list. Document developers are the users who edit documents in the Template editor, and get approvals, do template testing, create reviews and edit, download versions from the Versions tab, and can view, create and edit assets within the library.
- 2. **Project Services/Details** Complete any optional information.
 - Requested services Select all requested services required for the creation of your material. For a service not included in this section, select "Other" and enter its description in the box provided.
 - **Translations** Select this checkbox if you would like to notify users that a translation is required for this material.
 - **Compliance Types** Select all the compliance types required for your material. For a compliance type not included in this section, select "other" and enter its description in the box provided.

Note: You must choose a compliance type in this section for your compliance users to create compliance records when documents are submitted to a regulatory agency.

- **Copy Supplied** Select the Yes option if written copy is included in the request (If you select Yes but do not attach any copy in the **Attachments** tab, you receive a reminder to do so.)
- **Goals/Purposes** Select your material's goal/purpose from the drop-down list.
- **Tones** Select your material's tone from the drop-down list.
- Audiences Select your material's audience from the drop-down list.
- Main Message Enter the main message to be communicated by your material.
- Additional Copy Points Enter any additional copy points to be communicated by your material.
- **Required Elements** Enter all required elements to be included in your material (for example, PFFS disclaimers, logo, Excel table).
- **Final Project Format** Select from the drop-down list the final format required for production or fulfillment (for example, *InDesign file*, *DVD*).
- 3. **Printing & Distribution** Complete the required information.
 - Finished Size Enter the material's finished width and height.
 - **Quantity** Enter the total quantity required.
 - **Distribute to All** When you don't know the exact print quantity, but you do know the material is to be distributed to a specific group (for example, members), select the option for the appropriate group.

- **Paper Stock** Select the option for your preferred paper stock for the material. For a stock not included in this section, select "Other" and enter its description in the box provided.
- **Color** Select the required colors for your material.
- **Finishing** If your material requires special finishing instructions, select the checkboxes that apply for the finishing options.
- **Bleed** Select whether your material has a bleed edge.
- **Delivery Address1** Enter the first line of the delivery address for your material.
- **Delivery Address2** Enter the second line of the shipping delivery address for your material.
- **Delivery City** Enter the city address for your material.
- **Delivery State** Enter the state address for your material.
- **Delivery Postal Code** Enter the postal code address for your material.
- **Delivery Method (Ground, overnight, 2-day, etc.)** Enter the delivery method for your material (for example, UPS Ground).
- **Business Reply Address1** Enter the first line of the business reply address if your material requires a BRE (business reply envelope) or BRC (business reply card).
- **Business Reply Address2** Enter the second line of the business reply address for your material.
- Business Reply State Enter the city business reply address for your material.
- Business Reply City Enter the state business reply address for your material.
- **Business Reply Postal Code** Enter the postal code business reply address for your material.
- 4. **Requestor Info** Complete any optional information.
 - **Requestor name** As the project requestor, your name is auto-populated based on your log-in.
 - **Email** As the project requestor, your email address is auto-populated based on your log-in.
 - **Phone** As the project requestor, your phone number is auto-populated based on your log-in.
 - Lines of Business Your Line of Business (LOB) auto-populates based on your log-in.
 - **Departments** Select the appropriate departments from the drop-down list.
 - **Business Owners** Select the names of the material's business owners from the drop-down list.

Once you have filled out the Project Details, you can move to the remainder of the project record tabs.

Overview of project tabs

- 1. **Details** Includes four tabs with fields that have been populated as part of the project approval process.
 - a. **Project Overview** general project information, including project name and media type.
 - b. Project Services/Details requested services for the project.
 - c. **Printing & Distribution** document specifications and print quantity as well as distribution instructions.
 - d. **Requestor Info** contact information as well as budget and cost center fields.
- 2. **Tasks** Create and manage project schedules and tasks. Please see *Tasks and Traffic Management* in this user guide for detailed instructions on how to create and manage schedules and tasks in the Collateral Management Module[®].
- 3. Discussions Create project discussions and add comments. See Discussions.
- 4. **Rules** Create and manage project rules. See *Rules*.
- 5. **Templates** Create or upload templates and create versions. See *Templates Tab.*
- 6. Versions Access and edit document versions. See Working with Versions.
- 7. Reviews Manage template and version reviews. See Reviews and Schedules.
- 8. **Attachments** –Upload files specific to your project. Attachments from the initial project request form are also included in this tab.
- 9. **Compliance** –View the disposition status of a version's compliance and regulatory approvals.
- 10. Analyze (For Collateral Management Module[®] users with access to CodySoft[®]'s Regulatory Analyzer[®] Module) Generate and view reports from the Regulatory Analyzer[®]'s database of regulations. (If you do not have access to this module and would like more information regarding the Regulatory Analyzer[®], please contact your CodySoft[®] system administrator.)

Searching for projects using the search function

- 1. From the dashboard, select Projects
- 2. From the project choices, click Search Projects.
- 3. Enter the following information:
 - a. Name Enter as much as you know of the project's name.
 - b. **Status** Select the project's current status (or select "all statuses") from the pull- down menu.
 - c. **Media type** Select the project's media type (or select "all media types") from the drop-down list.
 - d. Job number Enter the project's job number, if you know it.
 - e. **PRNumber** Enter the project's project request number, if you know it.

- 4. Click **Search** (on the bottom right side of the screen). Search results appear below the gray bar.
- 5. To access a project record, click the project's job number.

Creating a new project from an existing project (Copy project function)

- 1. Open any Approved Project.
- 2. In the project record, click **Copy Project** on the upper right side of the screen.

Project 3	97 - Test3	2718 Approv	ed									
,	0											
					Сору	project	Complete	In Prog	gress	On Hold	Exit	Save
Details	Tasks	Discussions	Rules	Templates	Versions	Attach	nments C	ompliance	Ana	lyze		
Projec	ct Overview	Project Ser	vices/Detail	ls Printing	g and Distribu	ition	Requestor In	fo				

- 3. On the **Details** tab, update the content for all fields and sub-tabs, as necessary, including the **Project Manager** field. Make sure the name of the project is unique from the project it came from.
- 4. Click **Exit** on the upper right side of the screen. The status shows as Approved on the **Project Overview** tab. The new project or job # displays on the **Project Overview** tab.

Project Statuses: Approving and Declining New Projects

- 1. From the **My Projects** section on your dashboard, you can access Draft Projects and update statuses by clicking on the **Project Number**.
- 2. In the **Project**, the **Status** field is located at the bottom of the project record.

Project status options:

- 1. Submitted Draft Project status.
- 2. **Approved** Project status. You can only approve a project once, while it is in Submitted status. Once you approve a project, you have the following options:
- 3. In Progress selected after project schedule is created and tasks are assigned. A project can only move to an "In Progress" status after it has been approved.
- On Hold selected when a project needs to be placed on hold until it can become active again. Only "Approved" or "In Progress" projects can be placed on hold. You cannot place a project "On Hold" from the submitted status.
- 5. **Cancelled** selected when a project is cancelled. Projects can only be cancelled from an "In Progress," or "On Hold" status. To cancel a project:
 - a. Click Cancel Project

	Manageme	e nt dule®							Welcome Stephen Billias Profile Admin Help Loaoff
Home	Projects	Rules	Library	Inventory	Reports	Archives	Search Regulatory Rules	Admin	
New Rule	Rules	Search R	ules						

Project 397	- Test32718	InProgress
-------------	-------------	------------

					Copy proje	ect	Cancel Pro	ject	Comple	ete	On H	old	Exit	Save
Details	Tasks	Discussions	Rules	Templates	Versions	Atta	chments	Com	pliance	Ana	lyze			

b. A confirmation dialog displays:

Please confirm	×
Are you sure? This will cancel and archi	ive the project.
	Yes No

- c. Click Yes to cancel and archive the project.
- 6. **Completed** selected when a project is completed.

Submitted Status for Projects

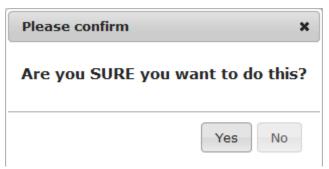
When a Project requires clarification or more information before it can be approved as a project, the **Submitted** status is used.

After a project has been approved, it can move to the other status options in the Collateral Management Module[®].

Submitted Project options

When a project is in a Submitted state, you have three options:

- Assign Project Manager You can assign a Project Manager to a project before approving it, thereby passing the approval responsibility to that person. Once you assign the Project Manager, that user is notified that he or she has been assigned to this project.
- 2. **Approved** reviewed and approved as a project by the Traffic Manager. To approve a project, complete all the required fields and click **Approve**.
- 3. Declined project request is rejected. To decline a project:
 - a. Click Decline
 - b. In the Confirmation dialog, click **Yes**.



c. In the decline Project dialog, enter a Comment as to why the project is being declined.

Decline Projec	ct	×
Comment *		
	Ok Cancel	

d. Click Ok.

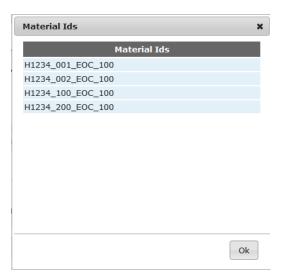
Approved status for Projects

- 1. On the Project Record, review all content on each tab to ensure the necessary information has been entered.
- 2. Edit the project information as needed.
- 3. When you are ready to approve the project, click **Approved** at the top of the project record.
- 4. Select the project's **Project Manager** from the **Project Manager** drop-down list at the bottom of the screen.
- 5. Click Exit.

View Material Ids:

When a project is approved, you can view the material Ids for the project:

- 1. In the **Project Record**, click the **Versions** tab.
- 2. Click View Material Ids. The material Ids dialog box displays.



- 3. Note the material Ids.
- 4. Click OK.

Declined status for Projects

- 1. When a project cannot be approved, the **Declined** status is used.
- 2. On the Project Request Form, click Decline.
- 3. At the confirmation prompt, click Yes.
- 4. The **Decline Project** box appears.
- 5. Enter a comment to explain why the Project is being declined.

Edit Project × +							-	. 8	×
Kan Strand Stran	8a5-6b237bf5ab71#tab_overview	⊽ ⊄	Q H4213-002	÷	☆自	Â	-	ø	≡
CollateralManagement reduke			Pr	elcome Alphonse Vale ofile Admin Help otifications (353) Search Project					^
Home Projects Rules Lit	brary Inventory Reports	Archives Search Regulatory Rule	es Admin						
New Project Projects Schedu	Decline Project	t	×						
Project 160 - Test Decline S	Comment *		.d	ve Decline	Save]			
Details Tasks Discussion	ons Te		alyze						
Project Overview Project Document Type Required / Optional	Ct Service O Moc	Ok Ca	ancel						

6. Click **Ok**.

Task Management

When a new project has begun, the **Traffic Manager** creates its project schedule, creating and assigning tasks. The Tasks tab is a GANTT-based visual view of the project's tasks, with tools for creating, assigning, editing, and managing project tasks.

Screen Layout

The Tasks tab screen is divided into three sections:

Import Tas	bay Fullso	Tasks To	<u>File</u> elect Colun	าทร													S	end N	lotific	ation	IS
	Assignee	# of Days	Progress	Status	Planne	d Actual		÷	07 Ma	08 Ma0	9 Ma 1	0 Ma1	1 Mag	12 Ma	13 Ma	14 Ma	15 Ma	16 Ma	17 Ma	18 Ma	
D	Cory Belde	1	100%	Complete	1h	10.01	1			F	irst t:	1									^
	Cory Belde	4	0%	InProcess	3h	0h		÷			4	5	Secon	d task							
D	Cory Belde	1 .	0%	InProcess	1h	0h	0	÷			с	hild		2							
D	Cory2 Beld	1	0%	InProcess	1h	0h	0	÷			с	hild		-							
D	Cory Belde	1	0%	InProcess	1h	0h	0	÷							Child						
	Nick Scalfc	3	0%	InProcess	1h	0h	0	÷				Nick	task (5/11							
P	Corv Belde	1	0%	InProcess	1h	0h	0	4					Samn								~
	1	Assignee			Compl	ete	Workl	oad	07 Ma	08 Ma0	9 Ma 1	0 Ma1	1 Mag	12 Ma	13 Ma	14 Ma	15 Ma	16 Ma	17 Ma	18 Ma	^
🗋 Co	ry Belden				28%		7h	ı													
🗋 Co	ry2 Belden2				0%		2h	3			1	.00									
🗋 Nie	ck Scalfone				0%		2h	n			C).33	0.67	0.67							~

Columnar View (1)

Provides the task information in columnar format, including these fields:

	Assignee	# of Days	Progress	Status	Planne	dActual	+
D	Cory Belde	1	100%	Complete	1h	10.01	
8	Cory Belde	4	0%	InProcess	3h	0h	+
D	Cory Belde	1	0%	InProcess	1h	0h	0 +
D	Cory2 Beld	1	0%	InProcess	1h	0h	0 +
D	Cory Belde	1	0%	InProcess	1h	0h	0 +
D	Nick Scalfo	3	0%	InProcess	1h	0h	0 +

- Assignee—who is assigned the task. Each individual task can have only one assignee.
- **# of Days**—Planned duration of the task in days
- Progress—Percent complete of the task, if any. Tasks not started show 0%
- **Status**—The status of the task. The status may be one of these values:
 - **Pending**—The task has not yet started. This could be because the project is not yet set to In Progress, or the start of the task is dependent on the completion of prior

task

- o In Process—The task is being worked currently
- o Complete—The task has been completed and Actual hours entered
- Planned Hours—Estimated hours it would take to complete the task
- Actual Hours—Hours it took to complete the task. This number may be updated as progress occurs on the task. This value is stored once the task is completed.

Gantt View (2)

The Gantt view provides the task information in a visual format, and is interactive in many ways.

- Double click a task to open it for editing
- Click and drag a task in either direction to change its start and end dates



Resource Allocation View (3)

The bottom portion of the screen displays the current resource allocation of project team members on a given project. The left side of the resource area displays high-level information on each resource:

- Assignee The name of the resource
- **Complete** The percentage of the resource's workload that is completed
- Workload The number of hours currently assigned to the user

The right side of the resource area displays the resource's allocation in hours

Assignee	Complete	Workload	07 Ma	a08 Ma	09 Ma	10 Ma	11 Ma	12 Ma	13 Ma	14 Ma	15 Ma	16 Ma	17 Ma	18 Ma ^
🗋 Cory Belden	28%	7h												
Cory2 Belden2	0%	2h												
Nick Scalfone	0%	2h				0.33	0.67	0.67	0.33					~

Navigation

Several buttons aid navigation on the Tasks tab:

- Month Displays tasks by month
- Day Displays tasks by day
- Fullscreen Opens the Tasks tab in a full screen view
- Select Columns Allows the user to select which columns display. Note this is not stored and is reset once the page is refreshed or navigated away from.
- Send Notifications Sends unsent notifications that have been created by task activity, such as adding a new task, changing the start or due date, the task duration, or assignee.
 - 1. Click **Send Notification** to send any unsent notifications that are queued up. The Send Notifications dialog displays the task name and the notification type that is queued up:

Send Notifications	×
Select tasks to send pending notifications and click OK Select All Deselect All	
🗹 Task - Ready to start	^
🗹 Corys review task - Ready to start	
🗹 Cory2 task - Ready to start	
🗹 Corys task - Due date changed	
🗹 Cory2s Task - Due date changed	
	~
Ok Cancel	

2. Click Ok to send all notifications

or

- 3. Deselect the checkboxes for any notifications you don't want to send yet
- 4. Click **Ok**.

NOTE: If you click Send Notifications and there are no pending notifications to send, you'll receive a message:

Warning!	×
There are no pending notifications at this time.	
	Ok

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If you deselect all pending notifications, you'll receive a message:

Warning!	×
Please select at least 1 notification	
	Ok

The exclamation point ① on a task may mean that there is another issue than unsent notifications. See *Exclamation Point* ① *for Outstanding Task Issues*.

Parent-Child tasks

The task scheduler uses the concept of parent and child tasks. A parent task is a main task that has several child tasks associated with it to form a grouping. These may be independent tasks that all occur at the same time, or they may be dependent tasks that occur in a series.

Cory Belde	4	0%	InProcess	3h	0h		+	Second task
Cory Belde	1	0%	InProcess	1h	0h	0	+	Child
Cory2 Beld	1	0%	InProcess	1h	0h	0	+	Child
Cory Belde	1	0%	InProcess	1h	0h	0	+	Child

When dragging Parent tasks earlier or later in the calendar, Child tasks move as well. Dragging child tasks moves the parent task also, expanding the start and end dates of the Parent task as needed.

Example 1:

If a parent task needs to be pushed out 2 days, all child tasks to that parent task follow this movement. All child tasks move out 2 days when the parent task is moved out.

Example 2:

When a child task is moved it will expand or contract the dates of the parent task accordingly. If you move a child task outside of the existing range, the parent task will adjust as it is made up of the contents of the child task(s) within it.

Dependencies

The task scheduler uses the concept of dependencies to drive things that need to occur in a specific sequence and cannot begin until prior tasks are completed.

To create a dependency:

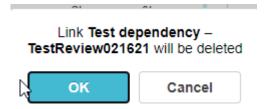
Click and drag from the round end point on the right side of a task
 Click and drag from the round end point on the right side of a task
 Test dependent on the task from which you dragged from.

2. A line appears, connecting the two tasks, with an arrow to indicate the hierarchy of the dependency, as in this example:



To delete a dependency:

1. Double-click the arrow that created the dependency. A confirmation message displays:



2. Click **OK** to delete the dependency

Review tasks

Review tasks are created from the Templates tab in the project See *Review Process for Project Managers*.

Color coding and shape of task bars

The Gantt chart provides color coding to help you read the information:

- Review tasks display in green
- Non-Review tasks display in blue
- Parent tasks have different-shaped bars, with down-pointing markers to indicate start and end dates



• The Gantt view shows today's date as a vertical line in the in center of the display:

16 Feb	17 Feb	18 Feb	19 Feb	20 Feb	
	TestReview0	Today			-
	StephenTest				
	TestRevie	ew021621			
	TestMultiple/				
	Ļ	TestMultiple/			

Plus sign to add tasks

Click the plus sign (+) in the header row to add a new top-level Parent task

Import Tas	sks <u>Export</u>	Tasks To	File					
Month	Day Fulls	creen	elect Colun	nns				Send Notifications
	Assignee	# of Days	Progress	Status	Planne	d Actual	+	07 Ma 08 Ma 09 Ma 10 Ma 11 Ma 12 Ma 13 Ma 14 Ma 15 Ma 16 Ma 17 Ma 18 Ma
• 4		3	0%	InProcess	2h	0h	+	Sample Template
D	Cory Belde	3	0%	InProcess	1h	0h	0 +	Product team task
D	Nick Scalfo	3	0%	InProcess	1h	0h	• +	Product team task
D	Cory Belde	1	100%	Complete	1h	0.016		New r
• 🖨	Cory Belde	1	0%	InProcess	3h	0h	+	
D	Cory Belde	1	0%	InProcess	1h	0h	• +	Child

Click the plus sign (+) next to any non-complete task in the list to add a new child task beneath that task



Update Task Progress

For Update task: Progress bar updates are reflected on the Gantt view. The task bar is shaded to the percentage specified in Edit Task, with a marker on the task to additionally show progress.

Task at 0% complete:



Task at 25% complete:



Drag the up arrow on the task to change the progress without opening the task

Task dialog box:

Task name		
Regular task		
Assignee		
Cory Belden	X T	
Start date		
04/15/2022		
End date		
04/15/2022		
Planned hours		
1		
Actual hours		
0		
Progress		
0%		
Description		
Corys regular task description		
Complete 💼 Delete 🗸 Save	⊘ Cancel	

Exclamation Point **1** for Outstanding Task Issues

The exclamation point **9** on a task flags the following outstanding issues:

Notification not sent – a notification was created by a change made to the task, including task creation and date or assignee changes, but the Send Notifications button has not been clicked yet.

Task missing assignee – a task was created but no assignment was made

Task is past due – a task is past the assigned due date

Scheduling By Traffic/Project Managers

With CodySoft[®]'s project scheduling feature, you can save valuable time by reusing the tasks and schedules you create by exporting from a populated project and importing into your project(s) you want to use the same schedule. For each task you create, you assign staff, estimated hours, start and due dates, and dependencies. You can also edit and revise tasks to accommodate mid-stream changes in your project's workflow.

As the Traffic Manager (and/or Project Manager, depending on how your company assigns roles and responsibilities), you are responsible for creating project schedules and assigning tasks. In the project record, there are several ways to do this. Please note that schedules and tasks can only be added after the project's status is set to **Approved**. After the schedule has been added and the tasks have been assigned, and you change your project's status is changed to **In Progress**, the tasks that do not have dependencies will go In Process and those to whom you have assigned tasks will receive notification emails.

NOTE: When a project is cancelled or completed and archived, all tasks are removed from users' dashboards, and notifications of those tasks are cleared.

Schedule/task options on the project record's Task tab

- 1. Add Task tasks are added individually to create a schedule or as additions to an existing schedule.
- Import Tasks use this option to add tasks previously saved as a CSV file with specific Start and Due dates. Note: if tasks already exist and you select this option, the existing tasks will be overwritten with the newly uploaded tasks.
- 3. **Export Tasks to File** exports all tasks in the current project to a CSV file for future use. If the project you export from is blank, the system will export the blank task template, to then be populated.

Creating and assigning tasks using Add Task (Plus sign) (+)

1. In the **Project Record**, click the **Tasks** tab.

2. Click the **plus sign (+)** on the header row to create a new task. The New Task dialog box displays.

Task name
New task
Assignee
Start date
02/11/2021
End date
02/11/2021
Planned hours
1
Actual hours
Progress
0
Description

- 3. Enter the required fields in the Create Task dialog box.
 - a. Task Name Enter the name of the task. Be sure to use good naming conventions that identify the purpose of the task, and the round of review if you have multiple templates for which you are creating tasks for reviews (see *Reviews and Schedules*).
 - b. **Assignee** Select a person to whom to assign the task. If you select multiple assignees, individual tasks will be created for each assignee.
 - c. **Start Date** Enter the task's start date.
 - d. End Date Enter the task's due date.
 - e. **Planned Hours** Enter the estimated number of hours it will take to complete the task.
 - f. **Actual Hours** Leave blank for now. The Assignee will enter the actual hours worked when the task is marked as complete.
 - g. **Progress** Leave blank for now. The Assignee will use the slider bar to enter progress on the task while the task is being worked.
 - h. **Description** Enter the description of the task.
- 4. Click **Save** to save the task.

Exporting tasks for future use

- 1. In the Project Record, click the Tasks tab
- 2. On the **Tasks** tab, click the **Export Tasks to File** link. The tasks are exported to a .csv file.

- 3. Select **Open with Excel** and click **OK**. Excel launches and shows your tasks in a spreadsheet format.
- 4. In the Excel file, click **Save As** to name your file and save it as a CSV file.

Importing saved tasks to a project record

- 1. In the Project Record, click the Tasks tab
- 2. On the Tasks tab, click the Import Tasks link. The Upload Tasks box appears.
- 3. Click Browse.
- 4. Select a CSV task file you created earlier.
- 5. Click **Open**. The file name appears in the box.
- 6. Click **OK**. The task list appears in the **Tasks** tab.

Creating tasks

- 1. Click the Tasks tab.
- 2. Click the plus sign (+) on the column header row to create a new parent task. The New task dialog displays:

09 March 2021 - 10 March 2021 New task	
Task name	
New task	
Assignee	
Start date	
03/09/2021	
End date	
03/09/2021	
Planned hours	
1	
Actual hours	
Progress	
Description	
•	
Save 🖉 Cancel	💼 Delete

- 3. Enter a new task Name.
- 4. Click in the Assignee field to add Assignees. The list of available assignees displays:

Assignee

~5	1	٦
	Adrienne Olson	•
	Al Valenti	
	Alphonse Valenti	
	Andy Casey	
	Annie O'Reilly	
	Attila Kozma	
	Brad Boyer	
	Brandon Williams	
	Brian Test	
		- L

NOTE: Adding multiple assignees in the create task dialog creates a single task for each assignee.

- 5. Enter a task Start date. The field defaults to today's date.
- 6. Enter an End date.
- 7. Enter the **Planned hours** it will take to complete the task.
- 8. Leave the **Actual hours** and **Progress** fields blank, these are for the Assignee to fill in when completing the task.
- 9. Enter a **Description** of the task.
- 10. Click **Save** to save the task. The task is added to the Gantt chart in its place on the calendar.

Editing tasks

- 1. Click the Tasks tab.
- 2. Double click the **task** you want to edit. The Edit task dialog displays:

05 January 2021 - 06 January 2021 New task
Task name
New task
Assignee
Stephen Billias 🗸
Start date
01/05/2021
End date
01/05/2021
Planned hours
1
Actual hours
0
Progress
0
Description
✓ Save ⊘ Cancel Complete

- 3. You can edit any of these task items:
 - a. Task Name
 - b. Assignee
 - c. Start Date
 - d. End Date
 - e. Planned Hours
 - f. Actual hours
 - g. Progress
 - h. Description
- 4. Click **Save** to save the changes to the task.

Deleting tasks

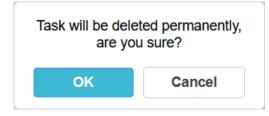
To delete a task:

If task has been created and committed but not started, you can delete the task. Double click on the task you wish to Delete, select Delete.

0	$\hat{\mathbf{v}}$		
Progress			
0%			
Description			
child tasks			
Complete	<u> m</u> Delete	✓ Save	⊘ Cancel

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A warning message will display



Click OK to delete the task.

The task tab has project management rules for deleting tasks. You cannot delete the following tasks:

- Parent tasks, regardless of status.
- Tasks with dependencies
- Tasks with greater than 0% progress.
- Completed tasks

Completing tasks

To complete a task from within the project:

1. From the Tasks tab, double click the **task** you wish to Complete. You can click in the table or the Gantt view, either one will open the edit task window

Task name	
Sample Task	
Assignee	
Cory Belden	× •
Start date	
05/11/2022	
End date	
05/11/2022	
Planned hours	
1 \$	
Actual hours	
0	
Progress	
0%	
Description	
This is a sample task.	
Complete 💼 Delete 🗸 Save	⊘ Cancel

- 2. Fill in Actual hours
- 3. Set Progress to 100%
- 4. Click Complete.
- 5. The "Are you sure" dialog box opens:

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Please confirm	×
Are you SURE you wan	at to complete this tack?
The you bone you han	it to complete this task:
	it to complete this task:

6. The screen will refresh and reflect the completion of the task.

To complete a task from the CM dashboard

- 1. From the **Tasks** section of your dashboard, locate the task you want to update as complete.
- 2. Select the task's Complete Task checkbox on the far right of the task row.
- 3. At the "Are you SURE you want to complete this task?" prompt, click Yes.
- 4. In the Set Actual Hours dialog box, enter the hours and minutes it took for task completion.
- 5. Click **OK**. A red checkmark in the checkbox indicates that the task is complete.

Completing the Project

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

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

The project is archived automatically.

Discussions

The **Discussions** tab is where you can communicate about your project request or project with your team. Discussions can be created for anything from requesting more information on a project request to discussing a layout's image requirements.

When a discussion has been created, an automated email is sent, notifying selected users of the discussion thread. Discussions work like message boards so you can see everyone's comments. The **Discussions** tab is accessible in both the project request and project record.

Details	Tasks	Discussions	Rules	Templates	Vers	sions /	Attachments	Compliance	Analyze		
Add Discu	ssion					8/20/2018					
Title		Description			7		mment to display	hover over function			
						timestamp	and author and	first 120 characters o	f most recent c		
Discussi	on Sub	Discussion desc	ription			0	pen	1	8/20/2018 0	5:01 PM	

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You can sort and filter on the Discussion columns. Hover over the number in the **# of Comments** column of any discussion to see the timestamp and the first few lines of the Comment. If the Description text is longer than can be displayed in the Description column, hover over the text to see the timestamp and the first few lines of the Description.

You can also see all your active discussions in your dashboard's My Discussions section.

Discussions may be linked to tasks also.

Adding a new Discussion

- 1. Click the **Discussions** tab.
- 2. Click the Add Discussion link. The Add Discussion dialog displays:

Add Discussion		×
Subject *		
Description *		1.
Task	Select Task	•
Users *	Select options	Ŧ
		Ok Cancel

3. In the Add Discussion box, enter the Subject and Discussion Description for your discussion.

NOTE: The subject and discussion description you add are included in the discussion's notification email. *Example* – Subject: "Copy"; Discussion Description: "When will copy be available?"

- 4. Optionally, select the Task associated with the discussion
- 5. Scroll down to select the **User(s)** to receive notification of your discussion from the dropdown list.
- 6. Click **OK**. Your new **Discussion** appears below the **Discussions** title bar.

Discussion Details

You can view the details of any discussion. Click the **Discussions** tab. The **Discussion Details** screen appears.

Project					
				Save	Close
Name	Discussion Subject				
Description	Discussion description				
Project Name	CB 3-12				
JobNumber	160				
Jsers	1 selected	*			
Add Comment					
Cory Belden			8/20/2018 04:06 PM		
Additional comment					
Cory Belden			8/20/2018 04:01 PM		

- User comments are sorted with the most recent comment at the top.
- You can add users to a discussion by selecting their names from the dropdown list.
- You can add a comment to a discussion from the Discussion Details screen. See Adding a comment to a Discussion.

Adding a comment to a Discussion

Use Comments to reply to Discussion items. You can have back and forth through Comments until the Discussion item is resolved and the discussion is closed.

- 1. Click the **Discussions** tab.
- 2. Click the appropriate **Discussion** (under the **Discussions** title bar).
- 3. The **Discussion's Details** screen appears.
- 4. Click the Add Comment link to add a comment. The Add Comment box appears.
- 5. Enter comments in the box and click **OK**. An email notification is sent to Comment recipients.

Closing a Discussion

- 1. Click the **Discussions** tab.
- 2. Click your discussion (under the **Discussions** title bar). The **Discussion's Details** screen appears.
- 3. Click **Close Discussion** (on the right side of the screen). The **Add Final Comment** box appears.
- 4. Enter comments in the box and click **OK**.

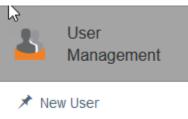
You and staff associated with this project will receive a confirmation email.

System Administration

CodySoft[®] allows the individual assigned as the System Administrator the ability to add new users and assign and edit user permission profiles.

Adding users and assigning permission levels

- 1. From the main dashboard of CodySoft[®], click User Management.
- 2. Click New User



The Create User dialog box opens.

	ashboard.codysoft.com/#//UserManagement/users/new					2	CODYSOF	T _e	🐥 🕶 📼 🗲 Brian Test Logout Help	61) -	*
	Create User										
CSCM	Create User										
► csP&P	User Info	Applications									
🖕 csHPMS	First Name	Applications:	CSRA	🔲 cslM	CsCM	CsScheduling	CsPandP	csHPMS	CSCCM	CSPBP	CsAandG
csPBPAdmin	Last Name Last Name Email		ADMN ANALYZER CONTRACTEDITOR HPMSEDITOR PANOPEDITOR	ADMIN CREATOR INVESTIGATOR MANAGER	ACMIN APPROVER ELISINESSOVINER COLLATERALVIEWER COMPLIANCE		ADMIN PROJECTMANADER POLICYTIVAR POLICYTEAMNEMEER PROJECTAPPROVER	ADMIN COMPLIANCE BUSINESSOWNER TASKOWNER ACTIONARPROVER	ADMIN COVINLIANCE BUGINESSOWNER TASKOWNER ACTIONAPPROVER	ADMIN	ADMN
User Management	Email Email User Name		REGULATIONEDITOR		ENDUSER		POLICKAPPROVER				
🖈 New User	User Name Department				PROJECTMANAGER						
	Select an Option										
	Lines of business Select Some Options Send Emails										

- 3. In the User Info section, enter information about the new user in the following fields:
 - a. First Name
 - b. Last Name
 - c. Email-Add user's complete email address, including @ information
 - d. User Name-This field is auto-filled with the user's email address as the name
 - e. Department-Select the user's department from the drop-down list
 - f. Lines of Business-Select one or more choices from the available lines of business
 - g. **Send Emails**–Select this checkbox if the user should receive email notifications from CodySoft[®]
- 4. In the Applications section, select the checkboxes for the user roles to which the user is assigned, for each available licensed CodySoft[®] application. In addition to Collateral Management (CM) your company may have licensed other CodySoft[®] applications. Check

with your CodySoft[®] system administrator counterpart if you are unsure which roles to assign to a user for which applications.

5. Click **Save**. The new user is added to the list of users.

Add a Single Sign On User

Some companies have Single Sign On (SSO) where users have one username and password for multiple applications. If your company uses SSO, an additional checkbox appears on the Create User screen:

User Info	Applications								
First Name	Single Sign Or	(SSO) 🗸							
First Name	Login Applications:								
Last Name	csGlobal	csRA	csIM	csCM	csPandP	CsHPMS	csCCM	csPBP	csAandG
Last Name	CLIENTADMIN	ADMIN ANALYZER	ADMIN	ADMIN	ADMIN	COMPLIANCE	ADMIN	ADMIN	
Email		CONTRACTEDITOR	MANAGER	BUSINESSOWNER	POLICYOWNER POLICYTEAMMEMBER	BUSINESSOWNER	BUSINESSOWNER	EXPORTER	REVIEWER QAREVIEWER
Email		PANDPEDITOR		COMPLIANCE ENDUSER	PROJECTAPPROVER	ACTIONAPPROVER	ACTIONAPPROVER		APPEALREVIEWER
Jser Name		RESEARCHER		EXECUTIVE	LIBRARIAN				NURSEREVIEWER
User Name				INVENTORYMANAGER	ENDUSER				CLAIMREVIEWER
Department				PROJECTMANAGER					PHARMACY
Select an Option	¥								_
ielect all / Deselect all ines of business									
Select Some Options									

Select the Single Sign On (SSO) checkbox to activate SSO for the new user.

Deactivate a User

To deactivate an existing user:

- 1. Select User Management from the main csDashboard
- 2. Find the user name in the list, or to search, enter a user name in the Enter User Name field
- 3. Click Search
- 4. Click the user name to select the user
- 5. Click **Disable** in the upper right of the Edit User screen. The user remains in the user list with the checkbox deselected in the **Is Active** column

NOTE: You can reactivate the user by following the same steps and then clicking Enable

User Roles

The following table describes the user roles in CodySoft's Collateral Management module. Check with your CodySoft[®] system administrator if you are unsure which roles to assign to a user in this module.

User Role	Description
Admin	The admin has client administrative rights. This user can set client- specific values for the configurable fields within the module.
All Permissions	This user has all permissions except admin rights. These permissions include compliance permissions. This is the most broad-based permission group available.
Traffic Manager	This user receives draft project requests as they are submitted. They can approve project requests and to assign project managers to the projects they have approved.
Project Manager	This user can assign tasks and approvals, approve templates and create versions of documents in the projects that they are assigned to. This person is responsible for the day-to-day management of collateral projects within the Collateral Management Module.
Document Developer* *NOTE—this role is assigned at the Project level on the Project Details tab, not as a global user role	This user will have access to the dashboard and can be assigned tasks within individual projects. They can edit documents in the Template editor, and get approvals, do template testing, create reviews and edit, download versions from the Versions tab, and can view, create and edit assets within the library. They can create rules within a template only, assign rules to projects, and edit their own rules but not other user's rules.
End User	This user will have access to the dashboard and to Projects, Discussions, Tasks, Submissions and Approvals tabs. They can be assigned tasks within individual projects. They can create projects so that they can assign project managers, and read template documents. They cannot create reviews, cancel templates, add templates, edit templates, or view revision history. and view assets within the library. They can download versions read only from the Versions tab and see and add attachments.
Compliance	This user can create and update compliance submission records.
Collateral Viewer	This user can view approved materials in the library.
Business Owner	A user with this permission will appear on the list of business owners in the project record. No additional permissions are associated with this profile. Usually, this user will have additional permission sets associated with his or her profile.
Approver	A user with the permission will appear to the project manager as a user who can be assigned to the template approval process. Usually, this user will have additional permission sets associated with his or her profile.

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User Role	Description
Executive	Reporting rights. For users for whom you would like to be able to access reports, this permission set will be applied.
Inventory Manager	This user can upload and manage inventory reports.
Librarian	This user will have full access to view, create and edit all library items, including the CM data tool. This user will most likely have additional permission sets associated with his or her profile.

Downloading the user list

From the **User Management** tab, you can download a list of users to an Excel spreadsheet for reporting purposes, for example to review users' roles and permissions. This download provides the ability to analyze users' configurations in spreadsheet form.

ODYSOFT.	=		C	ODY <mark>SOFT</mark> ,	🐥 👻 🚮 👻 Brian Test Logout Help
	User Management				
CsCM	Nusers .				
► csP&P	Users				
çshpms	Enter User Name	Select an Option	Search		٤
csPBP	User Name	Name	Tenant	Is Active	
Carbr.	adubay@codyconsulting.com	Amy Dubay	tenants/1		0
Admin	akozma@codyconsulting.com	Attila Kozma	tenants/1		2
~	alilly@codyconsulting.com	Annarose Lilly	tenants/1		0
User	aolson@codyconsulting.com	Adrienne Olson	tenants/1		8
Management	aoreilly@codyconsulting.com	Annie O'Reilly	tenants/1		*
New User	avalenti@codyconsulting.com	Al Valenti	tenants/1		*
	avalenti@codyent.com	Alphonse Valenti	tenants/1		2
	bboyer@codyconsulting.com	Brad Boyer	tenants/1		×
	bpymonroe@gmail.com	Brian Test	tenants/1		*
	brandon.williams@blueharborsolutions.com	Brandon Williams	tenants/1		
	byavorsky@codyconsulting.com	Brian Yavorsky	tenants/1		2
	cbeiden@codyconsulting.com	Cory Belden	tenants/1		æ.
	centenestage@gmail.com	Centene Stage Tester	tenants/1		2
	cmccool-aill@codvconsultina.com	Candace McCool-Gill	tenants/1		
	Total Items: 25			Page Size:	25 * 14 4 1 > >1

- 1. First, optionally filter the list by user name
- 2. Next, optionally filter the list by electing a user role from the dropdown list. You can filter by both fields in combination, for example, to see all users with gmail in their user name in a specific user role.
- 3. Click **Search**. The user list is filtered by your choices.
- 4. Click the download button . The filtered or unfiltered list is provided as an Microsoft Excel Comma Separated Values (.csv) file. You can open or save the file.

User Groups

Cody will work with you to establish user groups based on your needs. Please contact your system administrator to help create user groups.

Admin dashboard

The System Administrators can also add content to the following fields on the **Admin** dashboard by clicking any section tab:

- 1. Lines of Business
- 2. Departments
- 3. Media Types
- 4. Audiences
- 5. Cost Centers
- 6. Plan Types

Unlock Entities

As project manager, you can unlock items like templates that have been unintentionally left locked by users, for others to access them.

1. From the Admin tab click **Unlock Entities**. The Locked Entities screen displays:

Collateral	Manageme	nt Iule®		(CODY <mark>SOFT</mark> 。	🔺 🗷 1	rch Projects
Home	Projects	Rules Library	Inventory Reports Archiv	ves Search Regulat	tory Rules Admin		
ocked I	Entities						
Project Nun	nber	Entity Type	Title	Description	User Name	Locked On	Marke
roject Nun	mber	Entity Type	Title	Description	User Name	Locked On	Marke
roject Nun <u>40</u>	mber	Entity Type	Title	Description Word	User Name	Locked On 5/19/2021	Marke
<u>40</u>	mber						
-	nber	Template	Test Preview	Word	Cory Belden	5/19/2021	
40 37	nber	Template Template	Test Preview AsposeTest012921	Word Word	Cory Belden Gaurav Singhal4	5/19/2021 5/20/2021	
40 37 35	nber	Template Template Template	Test Preview AsposeTest012921 Triple S DOCX exte	Word Word Word	Cory Belden Gaurav Singhal4 Attila Kozma	5/19/2021 5/20/2021 1/15/2021	

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- 2. Select the checkboxes in the Marker column for the items you want to unlock
- 3. Click Unlock Selected. The items are unlocked and removed from the list

Unlocking a file in Edit File

As project manager, you may have to unlock a file occasionally, for example, if someone started to edit a file and then went on vacation without completing the task.

From the Unlock File column on the Review Summary, click Unlock.

•	Reviews in F	Progress					
	Name	Template Type	Review Method	Review Round	Reviews Complete	Unlock File	Mark Complete
	DEMO DOC	Base Template	Routing	3	0/2	Unlock	Mark Complete

The file becomes available for review by others.

NOTE: As project manager, be sure to use Unlock File only when you have a valid request or reason to do so. If another user has the file open, and you select Unlock File, the person who has the file open will have to save a local copy of the file.

Notifications Table

The system sends notifications when there are changes to status or other changes about which an owner needs to be notified. Here is a chart that details when and to whom notifications are sent. Blue color and underlining indicate a linked field:

Notification Condition	Notification/Email	Notification/Email text
	subject line	
When a project is	[Project #], [Project	You have been assigned as the Project
assigned, notify Project	Name] was assigned	Manager for this project. Project #, Project
Manager	to you	Name, Tenant #, <u>Link to Project</u>
When a task is assigned	You may begin [Task	The following task has been assigned to
	#] [Task Name] for	you (see below) and you may begin now.
	[Project #] [Project	Project #, Project Name, Tenant #, Task
	Name]	Name, Description, Start Date, Due Date,
		Link to Project
When a task is put on	[Task Name] for	The task you have been assigned is now on
hold	[Project #] [Project	hold. A previously completed parent task
	Name] has been put	has been reopened. Please contact your
	on hold	Project manager if you have any questions.
		Project #, Project Name, Tenant #, Task
		Name, Description, Link to Project
When a task has been	Completed: [Task	The following task has been completed for
completed.	Number] [Task	this project: Project #, Project Name,
	Name] for [Project #]	Tenant #, Task Name, Task Assignee,
	[Project Name]	Description, Link to Document.
When a task start date	Start Date Change -	The following task has been changed for
is changed	Task Number] [Task	this project: Project #, Project Name,
	Name] [Project #],	Tenant #, Task Name, Description, Link to
	[Project Name]	Project

Notification Condition	Notification/Email	Notification/Email text
	subject line	
When a task due date	The Due Date for	The following task has been changed for
is changed	[Task Number] [Task	this project: Project #, Project Name,
is changed	Name] [Project #],	Tenant #, Task Name, Description, New
	[Project Name] has	Start Date, Link to Project
	changed	Start Date, <u>Link to Project</u>
When a user is	You've been assigned	Tenant #, Asset Name, Link to Asset. Please
assigned as an Asset	as an Asset Approver	review this Asset and mark it as either
Approver	for [Asset Name]	approved or declined. If you mark it
		declined, you will be required to create a
		discussion to explain why you have
		declined the Asset
When a template or	You can mark	All Approvers have approved the
asset has been	Template/Asset	Template/Asset. You can now mark it as
approved by all	[Template Name]/	approved. Template/Asset Details, Tenant
approvers	[Asset Name] as	#, Template/Asset Name, Link to
	approved	Template/Asset
When an asset	Asset [Asset Name]	Your Asset has been Approved. Asset
approval is received	Approval received	Details, Tenant #, Asset Name, Link to Asset
When an asset is	Asset [Asset Name]	Your Asset has been Declined. Tenant #,
declined	Declined	Asset Name, Approver, Link to Asset
When an asset is	The [Asset Name] has	Tenant #, Project #, Project Name, Link to
updated	been updated	<u>Project</u>
When a new discussion	New Discussion:	A discussion has been created for project.
is added	[Project #] - [Project	Project #, Project Name, Tenant #, <u>Link to</u>
	Name]	Project, Title of discussion, Description,
		Creator
When a comment is	Comment has been	A comment by [Commenter Name] has
added to a discussion	added to a discussion	been added to the following discussion for
	[Project #] - [Project	project. Project #, Project Name, Tenant #,
	Name]	Link to Project, Title of discussion,
		Description, Comment
When a discussion is	Project Discussion	The following discussion has been closed by
closed	closed: [Project #] -	[Project Manager] Project #, Project Name,
	[Project Name]	Tenant #, Link to Project, Title of
		discussion, Description, Final Comment \underline{t}
When an approver is	You've been assigned	You've been assigned as a [Template
assigned to review a	as a Template	Name] Approver for [Template Name].
template	Approver for	Project #, Project Name, Tenant #,
	[Template Name] in	Template #, <u>Link to Template</u>
	[Project #] [Project	
	Name]	

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Notification Condition	Notification/Email	Notification/Email text
	subject line	
When template approval is received	[Project #] {[Project Name] [Template Name] Approval Received	Your Template has been Approved. Project #, Project Name, Tenant #, Template Name, Approver, <u>Link to Template</u>
When a template review is completed	Template Review Completed for [Project #] [Project Name] [Task Assignee]	The following review [Template Name] has been completed for Template: Project #, Project Name, Tenant #, Template Name, Task Assignee, Date Finished, <u>Link to</u> <u>Template</u>
When a template is declined	[Project #] [Project Name] Declined	Your Template has been Declined. Project #, Project Name, <u>Link to Discussion</u> , Tenant #, Template Name, Approver, <u>Link to</u> <u>Template</u> t
When a project manager is assigned to a project	[Project Manager] assigned to [Project #] [Project Name]	The project manager for your project is: [Project Manager]. Project #, Project Name, Tenant #, <u>Link to Project,</u>
When Project is approved, notify Project Manager	[Project #] [Project Name] is Approved	Your project request has been reviewed and approved by [Approver Name]. You may begin work on the project. If your project details require a change, please contact [Approver Name]. Project #, Project Name, Tenant #, Link to <u>Project</u> .
When a project completion date changes	Project Completion Date has changed: [Project #] – [Project Name]	The completion date for your project has been changed. Revised completion date: [Date]. Project #, Project Name, Tenant #, Link to Project.
When a project is completed or canceled and moved to Archive	[Project # [Project Name] has been Archived	Project was moved to Archive. Project #, Project Name, Tenant #, Requested by

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Notification Condition	Notification/Email subject line	Notification/Email text
When new versions are created	Version Creation Summary [Project #] [Project Name]	The following versions were created for this project: Project #, Project Name, Template #/Name, Tenant #, <u>Link to</u> <u>versions</u>
When version creation fails on some plans	Version Creation Summary [Project #] [Project Name]	The following versions were created for this project: Project #, Project Name, Template #/Name, Tenant #, <u>Link to</u> <u>versions</u> Failed to Create Versions Plan #: Failed Reason: Plan #: Failed Reason:

Compliance

The **Compliance** feature helps you track compliance and regulatory approvals for your documents. For each approved version in a project record, you can define the **Compliance Type** you need to track (internal, legal, CMS, Medicaid, DOI, etc.), its **Submission Type** (5-day, 45-day, etc.) and its **Disposition Type** (file-and-use, CMS approved, deemed, etc.). You can track multiple compliance types for each approved version.

Information for Compliance Staff

Overview of Compliance dashboard

As compliance staff, when you log onto CodySoft[®], you will see the following sections on your dashboard. (See *Dashboard* for more information on navigation and personalization.)

- 1. My Project Requests This is where to find a list of project requests you've submitted.
- 2. My Projects This is a list of projects in which tasks have been assigned to you.
- 3. My Tasks This is a list of all pending tasks assigned to you.

- 4. My Discussions This is a list of discussions in which you are a participant.
- 5. My Submissions This is a list of the submissions you've created.
- 6. All Submissions This is a list of ALL submissions.

In the project record, you can create compliance entries for every approved version of a document. For example, if Document A requires approval from your legal department before it can be submitted to the appropriate state's regulatory agency, you create a compliance entry for your legal department's review. Once the legal approval is received, you then change the status of its compliance entry disposition to Approved and add its approval date, the Disposition Date. Next, you create a second compliance entry for the same version of the document. This time, however, the **Compliance Type** is for the state regulatory agency and the **Submission Type** for the state, for example 30-day. After approval is received, you change the status of the disposition from Pending to Approved and add its approval date, the Disposition Date.

Create a compliance entry for a version

- 1. A compliance entry is created from an approved version. (See *Approving a template*).
- 2. On the Versions tab, click Create Compliance icon . The Add Version Compliance box appears.
- 3. Enter the following information:
 - a. **Compliance** Select the compliance type from the drop-down list.
 - b. Submission Type Select the submission type from the drop-down list.
 - c. Submission Date Select the submission date on the calendar widget.
 - d. Click OK.
- 4. The Version Compliance window appears. Click OK.
- 5. Click the **Compliance** tab to see your compliance entry.

Changing the status of a compliance entry's disposition

- 1. From the **My Submissions** section of your dashboard, click the project or job number of the piece you want to update. The **Compliance** tab appears.
- 2. On the **Compliance** tab, click the version name of the compliance entry you want to edit. The **Edit Compliance** box appears.
- 3. Select the **Disposition Date** on the calendar widget.
- 4. Select the **Disposition** from the drop-down list.
- 5. Click OK.

Remember to check and update your **My Submissions** items on a regular basis so that others see their project's approval statuses.

Regulatory Analyzer®

The CodySoft[®] Regulatory Analyzer[®] contains client-approved CMS marketing guideline rules that are used to research regulations and to verify template content is compliant. The Regulatory Analyzer[®] can also be customized to include rules of other regulatory agencies and any company-specific business rules.

Search Regulatory Rules

From within the Collateral Management Module, you can search for regulations relevant to your project.

- 1. From the main menu, select **Search Regulatory Rules**. The Regulatory Analyzer[®] search dialog box opens.
- 2. In the Search bar, enter a word or phrase and click Search.

Regulatory Analyzer[®] returns a list of relevant responses. For example, a search of the word "appeals" returns this set of results:

appeals		Searc
Did you mean? <u>appeal</u> <u>appear</u> <u>apply</u> <u>apper</u>	<u>ndix</u>	
		Items per page: 5
MediaTypes		
Script (1)	Final Rule #	MMCM 3. APPENDIX 3
Web Content (1)	Final Rule Title	Appendix 3 – Pharmacy Technical Help/Coverage Determinations and Appeals Call Center Requirements
RegulatoryProjectTypes		Pharmacy Technical Help Call Center Requirements 42 CFR 423.128(d)(1)
Post-Enrollment (2)	Media Type	
Pre-Enrollment (2)	Regulation Project Type	
Website (1)	Audience	Plan
PlanTypes	Plan Type	
Cost (3)	Media Project Type	
Ma (3)	Major Subject	PHARMACY TECHNICAL HELP/COVERAGE DETERMINATIONS AND APPEALS CALL CENTER
Mapd (3)		REQUIREMENTS
Mmp (3)	Minor Subject	
Msa (1)	Regulation Type	CMS
Pdp (3)	Plan Year	
Pffs (1)		2016
Audiences		echnical help call center or make available call support to respond to inquiries from pharmacies and providers regarding the
Members (3)		iries may pertain to operational areas such as claims processing, benefit coverage, claims submission, and claims payment. This of on-call staff pharmacists or by contracting with the organization's PBM during non-business hours as long as the individual
Plan (1)		time. The call center must operate or be available during usual business hours, which CMS interprets to mean during the entire peri
Prospects (3)		its plans' service areas are open (e.g., Part D Sponsors whose pharmacy networks include twenty-four (24) hour pharmacies musi
MajorSubjects		enty-four (24) hours a day as well). To be considered fully compliant with the regulatory requirement to meet standard customer
Call Center (2)		nelp call center operates within the following standards: • Average hold time not to exceed two (2) minutes (the average hold time is
Marketing Activities (2)	defined as the time spent on hold by the caller follow	ing the interactive voice response (IVR) system, touch-tone response system, or recorded greeting and before reaching a live perso
Materials (2)		in thirty (30) seconds; and • Disconnect rate of all incoming calls not to exceed five (5) percent. Part D Sponsor Coverage
Pharmacy Technical Help/Coverage Determinations		ts 423.128(b)(7), 423.128(d)(1)(iv), 423.566(a) All Part D Sponsors must operate a toll-free call center with live customer service
And Appeals Call Center Requirements (1)		rrollees for information related to coverage determinations, including exceptions, prior authorizations, and appeals. Part D Sponsors
Website And Social/Electronic Media (1)		rage determination and redetermination processes via their toll-free call centers. The call centers must operate during normal
MinorSubjects		at least 8:00 a.m. to 8:00 p.m., Monday through Friday; in the time zones for the regions in which they operate. Part D Sponsors a ions/redeterminations outside of normal business hours, but are not required to have live customer service representatives available
Call Center-Informational Scripts (1) Call Center-Requirements (2)		ionsredeterminations outside of normal business nours, but are not required to have live customer service representatives available . Additional details are available in Chapter 18 of the Prescription Drug Benefit Manual. Voicemail may be used outside of normal
Marketing Activities-Telephonic Activities (2)		 Indicate that the mailbox is secure: • List the information that must be provided so the case can be worked, (e.g., provider
Materials-Creation (2)		t (coverage determination or appeal), physician support for an exception request, and whether the enrollee is making an expedited
Materials-Creation (2) Materials-Electronic (1)		(including exceptions requests), articulate and follow a process for resolution within twenty-four (24) hours of call for expedited
		uests; and • For appeals calls, information should articulate the process information needed and provide for a resolution within
Medicare (4)	seventy-two (72) hours for expedited appeal requests	and seven (7) calendar days for standard appeal requests.
RegulationTypes		
Cms (4)		
MediaProjectTypes	Final Dula #	
	Final Rule #	MMCM 3.100.2
Creation (2)		
Creation (2) Website (1)	Final Rule Title	100.2 - Required Content 42 CFR 422.111(b) and (h)(2), 42 CFR 423.128(b) and (d)(2)

The search results identify categories where results are found. Click any of these links to see the specific result for that category. For example, if you clicked Script from the

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category Media Type above, you would see the single search result for the Media Type/Script category.

Analyze

From within a project, you can perform an analysis that returns a list of relevant documents in the Regulatory Analyzer[®] database, including CMS guidelines, rules of other regulatory agencies, and company-issued documents, based on criteria you specify.

Details	Tasks	Discussions	Rules	Templates	Versions	Reviews	Attachments	Compliance	Analyze	
Repor	ts New	v report								
		Create	ed By			-	Created On			

- 1. From a project's menu click **Analyze**
- 2. Click New Report
- 3. Click Analyze

ils	Tasks	Discussions	Rules	Templates	Versions	Reviews	Attachments	Compliance	Analyze
	Y								
eports	New	/ report							
									Analyze

4. In the Set Regulatory Project Type dialog box, select the **regulatory project type** you want to search



- 5. Click OK
- 6. Depending on query results, the program may or may not ask questions associated with the project type. For example:

Reports New report		
		Analyze
	1. Does this piece include co-branding?	
	○ Yes ○ No	
	- 165 - 140	
<< Prev Next >>	Generate report	

7. When you have answered all questions (if any) click Generate report

Reports New report	
	Analyze
Generate report	

The Regulatory Analyzer[®] generates a report with a listing of all rules that meet the criteria you specify, with their major subjects and other references listed also.

project: Test		
project: Test Media Type: ANOC		
Project Type: Post-Enrollment		
Plan Type: MAPD		
Rule: MMCM CH 3 10		

Major Subject: Marketing Activities, Materials

The Medicare Marketing Guidelines (MMG) implement the Centers for Medicare & Medicaid Services' (CMS) marketing requirements and related provisions of the Medicare Advantage (MA, MA-PD) (also referred to as Plan). Medicare Prescription Drug Plan (PDP) (also referred to as Plan T) Deponsor), and except where otherwise specific 18% cost plans (also referred to as Plan) rules, (i.e., Title 42 of the Code of Federal Regulations, Parts 422, 423, and 417). These requirements also apply to Medicare-Medicaid-Coordination Medicare

Other References: Title 42 of the Code of Federal Regulations, Parts 422, 423, and 417; http://www.cms.gov/Medicare-Medicaid-Coordination/Medicare-and-Medicaid-Coordination/Medicare-Medicaid-Coordination-Office/FinancialAlignmentInitiative /InformationandGuidanceforPlans.html; Section 1851(h) and 1860 D-4 of the Social Security Act (the Act); 42 CFR section 417.428, section 422.2260, and section 423.2260; 42 CFR section 417.428, sectio

Library

The **Library** is where you upload, store and manage **Assets** for use in projects.

Legacy Library

Uploading legacy materials:

- Complete the CodySoft[®] "Legacy Materials Manifest" file that your CodySoft[®] implementation manager provided to you. Note: the format of this excel document must not change, and you must format the information in it in the same way that the sample information is formatted.
- 2. From the dashboard, select Library.
- 3. From the Library choices, click **Create Legacy**.
- 4. Upload the manifest file by browsing to its location.

Create	× +											- 0	×
♦ ▲ https://cm	n.codysoft.net/LegacyMaterial/Create			⊤ C ⁱ	Q Search		•	☆│自	Â		1	ø	≡
	CollateralManagement reduk*					Welcome Alphons Profile Admin He Notifications 364							^
	Home Projects Rules Librar	y Inventory Rep	orts Archives Search Regu	atory R	Rules Admin								
	Create Legacy Material									1			
		Manifest File:	Browse No file selected.										
	Home Projects Rules Library Inventory This document contains confidential inform		ary use by Cody Consulting only and c © 2014 Cody Consulting Group, I	innot be	reproduced or used without	the sole permission of (Cod	ly Consu	ting.				
													~

NOTE: the manifest file must be an Excel spreadsheet.

5. Complete the Mapping of information on the manifest and click **Save**:

Home	Projects	Rules	Library	Inventory	Reports	Archives	Search Regulatory Rules	Admin
Mappin	ng							
File name			DEMO Lega	acy Files Mar	ifest AV_51	415 .xisx		
CMS Mate	erial Identifie	er *	CMSMater	ialIdentifier		*		
Descriptio	on *		Description	1		~		
Language	*		Language			>		
Contract Y	rear *		ContractY	ear		>		
Lines Of B	Business *		LinesOfBu	siness		>		
Audience	*		Audience			>		
MCE Num	ber *		MCENumb	er		>		
Contract N	Numbers *		ContractN	umbers		>		
Plan Numb	bers *		PlanNumb	ers		>		
Media Typ	es *		MediaTyp	es		>		

Save

6. After the spreadsheet is uploaded and the manifest mapped, select the corresponding file for each line in your legacy manifest, and click **Save**:

F								come Stephen Bil file Admin Help 155	
CollateralManage	ment module®							Search P	rojects
Home <u>Projects</u> New Project Pro		ibrary Inv		ports Archives	Search Regulate	ory Rules Admin			
#	Description		Contract	Lines Of Business	Audience MCEN	umber Contract Numbers	Plan Numbers	MediaTypes	File
H1234_001_EOC_1	30 ANOC-EOC	En	2015	Medicare	Members	H1234	001(H1234), 	ANOC	Select file
H1234_002_EOC_13	30 ANOC-EOC	En	2015	Medicare	Members	H1234	002(H1234), 	ANOC	Select file
H1234_003_EOC_13	30 ANOC-EOC	En	2015	Medicare	Members	H1234	003(H1234)	ANOC	Select file
									Save

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

Home Projects Rules Library Inventory Reports Admin Help

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NOTE: You must select a file for each line in the manifest before saving.

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Inventory

CodySoft[®]'s inventory management tool organizes reports from your various vendors into a common platform, so you can see the current inventory on all your materials, where they're being stored, their reorder levels and usage information – all in one convenient location. With this tool, inventory information from all your chosen vendors is consolidated into one report. The tool also lets you create reorder alerts so you can stay ahead during peak times.

Accessing your current inventory records

- 1. From the dashboard, click **Inventory.**
- 2. Your current consolidated vendor inventory report displays, including the following information:
 - a. Vendor This is the vendor's name.
 - b. **SKU** This is the stock-keeping unit, or item number, used to identify each individual piece in inventory. This is also the version name.
 - c. **On Hand** This is the quantity in inventory.
 - d. Usage This is the amount of stock removed from inventory.
 - e. As of Date This date reflects the amount of stock on hand and used as of the date the information was tallied.
 - f. Added On This reflects the date the vendor's information was uploaded.

Overview of inventory menu

- View Inventory Records This is the same view as when you click Inventory. It shows your current consolidated vendors inventory report of all the reports you have uploaded into CodySoft[®].
- 2. Upload Inventory Records This is where you upload your vendors' inventory reports. It is recommended that all your vendors provide their reports on a specified date each month, so you have a common reference date for all your materials regardless of where they are stored. Recommend to your vendors that they format their files to match the column titles in the system. NOTE: CodySoft[®] is completely vendor agnostic.
 - a. From the **File to Upload** field, click **Browse** to select the file to upload from your computer.
 - b. After selecting the file, click **Open**.
 - c. Select the Vendor Name from its drop-down list.
 - d. Match the column titles from the uploaded file, where necessary, to the system.
 - e. Click Save.
- 3. **Create Inventory Reorder Levels** This is where you set reorder quantities for each SKU. **NOTE**: For each SKU, you can create multiple inventory reorder levels. For example, if a particular SKU has a higher usage volume during Open Enrollment than

during the rest of the year, you would create separate reorder levels for each time period.

- a. Version This is the SKU, or item number, for each material.
- b. **Start Date** This is the date you want to start tracking the SKU's current quantity.
- c. End Date This is the date you want to stop tracking the SKU's current quantity for a specified minimum quantity. If the quantity reaches the specified minimum inventory level during this period, evaluate the need for reordering the material.
- d. **Minimum Inventory** This is where you specify the minimum quantity (aka "low stock number") of a SKU allowed in inventory (for a specific timeframe) before you consider reordering the material.
- e. **Minimum Reorder** This is the minimum quantity to be reordered when a SKU has reached its minimum inventory level for a specified timeframe.

2		<u>Profile Admin Logout Help</u>
CODYSOF		Search Projects
Home Projects Rules	; Library Inventory Reports	
View Inventory Records Upl	load inventory Records Create Inventory Reorder Level Inventory Reorder Levels	
Create Reorder Lev	el	
		Save
Version *	HH Letter_D11_11	
Start Date *	01/01/2011	
End Date *	3/14/2011	
Minimum Inventory *	50000	
Minimum Reorder *	100000	

Create Inventory Reorder Level

4. **Inventory Reorder Levels** – Click to view a report showing all SKU inventory reorder levels and associated dates.

Reports

With CodySoft[®]'s reporting feature, you can generate, save and print reports easily.

Accessing reports

- 1. From the main menu bar, click **Reports**.
- Select Web Reports, Xlsx Reports, or Chart Visualizations. Web reports are output in a browser and can be saved in a variety of formats. Xlsx reports are output as Excel files. Chart Visualizations provides data analytics in graphic formats.

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Web Reports

Overview of Web Reports

- 1. Weekly Production Meeting This report includes each active project, its tasks, assigned staff and percent complete for each task.
- 2. **Daily Tasks** This report is used by managers to view their staff's current daily tasks. It provides an at-a-glance view of workloads to help prioritize tasks with conflicting due dates.
- 3. **Past Due Tasks** Similar to a "red flag" report, this report shows a list of tasks pending completion with due dates that are past due.
- 4. Workload Balance Report This report takes the "estimated hours" data form each task in your production schedules and totals it for each staff member. This tool is useful for planning and task delegation of work coming into the department.
- 5. Weekly Executive Report This report allows company executives to see all projects and their associated tasks currently in your system.
- 6. Project Status By LOB This report sorts your projects by line of business.
- 7. **Medicare Communications Materials Tracking** This report has detailed information about each material that is currently in development and its status.
- 8. Custom Report See Custom Reports

Downloading Web reports into Excel (or other formats)

- 1. In a report, select a format from the Export drop-down list.
- 2. Click Export.
- 3. Click **OK** to open your report in the chosen format.

Xlsx Reports

Overview of Xlsx Reports

- 1. **Materials Tracker Communications** This report includes detailed information on projects, including the following columns:
 - a. Job #
 - b. Material ID
 - c. LOBs
 - d. Project Name
 - e. Project Due Date
 - f. Contract and Plan ID
 - g. Project Status
 - h. Requestor

- i. Project Manager
- j. Departments
- k. Business Owners
- I. Media Type
- m. Regulatory Project Type
- n. Latest non-completed task
- o. Last Assigned Task Owner
- p. Task Start Date
- q. Task Due Date
- r. #Tasks Completed
- s. Submission Type
- t. CMS Submission Date
- u. CMS Disposition Date / Type
- v. Translation Required
- w. Layout/Design
- 2. **Materials Tracking Compliance** This report contains information that is useful to a Compliance Manager, including the following columns:
 - a. Material ID
 - b. Job #
 - c. LOBs
 - d. Project Name
 - e. Project Due Date
 - f. Project Status
 - g. Requestor
 - h. Project Manager
 - i. Departments
 - j. Business Owners
 - k. Media Type
 - I. Regulatory Project Type
 - m. Latest non-completed task
 - n. Last Assigned Task Owner
 - o. Submission Type
 - p. CMS Submission Date
 - q. CMS Disposition Date / Type
 - r. Translation Required

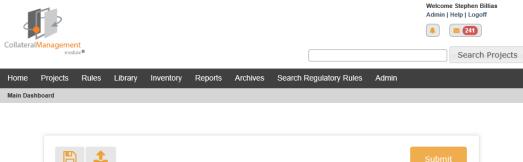
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- 3. **Materials Tracking Status** This report provides detailed information on project status of materials, including the following columns:
 - a. Project Number and Name
 - b. Project Status
 - c. Material
 - d. Request Date
 - e. Project Workflow
 - f. Requestor
 - g. Review Stream
 - h. Task
 - i. Assigned Task Owner
 - j. Task Start
 - k. Task Finish
 - I. SLA
 - m. Duration

Custom Reports

The Collateral Management Module[®] has a custom reporting tool that allows you to choose the fields from the application on which you want to report.

- 1. Select Custom Report from Web Reports
- 2. **Choose your output** The output is your selection of fields for your custom report. To add a new field, highlight the field on the left, and click **Add Field** in the center column. The field is added to your output column:



Select fields:	Selected fields:
Project Record Document Type Required / Optional MCE Project Media Type Status Duration Project Age Dates Start Date Plan Year Expiration Date Past Due Projects Plan Information Line of Business Plan Type Sub Plan Type Sub Plan Type MCE Number Contract Number Plan Number Project Services/Deta Translations	Add Field Add All Fields Remove Field Remove All Fields

Selecting Output for Custom Report

Here is a list of the available fields and their categories:

Project Record

Document type Required/Options MCE Project Media Type Status Duration Project Age

Dates

Start Date Due Date Plan Year **Expiration Date** Past Due Projects **Plan Information** Line of Business Plan Type Sub Plan Type MCE Number **Contract Number Plan Number Project Services/Data** Translations **Requested Services** Audience Compliance

Requestor Information

Business Owner

Department

Project Requestor

Request Date

Tasks/Scheduling

Task Number

Task Title

Task Start Date

Task Due Date

Task Progress

Task Completed ON

Task Assigned To

Task Assignee Department

Task Duration

Past Due Tasks

Task SLA (Service Level Agreement)

Compliance Information

Compliance Type

Submission Type

Submission Date

Disposition

Disposition Date

Once you have selected your desired fields, click **Please Select Filters.** You can filter the output that you have selected by three categories:

- Project Record Dates
- Plan Information/Project Services
- Task Scheduling/Compliance

ease Select Output:			
ease Select Filters:			
Project Record/Dates Plan Infor	mation/Project Services	Tasks Scheduling/Cor	mpliance
PROJECT RECORD	DATES		
Document Type	Start Date		
○ Model ○ Non-Model	From	То	
 All 		Please select	\sim
Required / Optional	Due Date		
	From	То	
O Optional		Please select	
All		Fieldse select	
Project Availability	Plan Year		
Include Archived			
MCE / Non MCE Projects	Expiration	Date	
Please select	From	То	
		Please select	
Project Status			
Please select *	Request Da	ite	
	From 03/2	27/2018 To 03/27/2	2019
Project Manager Please select			
Flease Select			
Media Type			
Please select *			
Project Requestor			
i roject kequestor			

NOTE: On the Start Date, Due Date, and Expiration Date fields on the Project Record/Dates tab, you can filter by date from a dropdown list that includes standard intervals, such as This week, Last Week, This Month, or Last Month. You can select whether to include Archived projects also. The Collateral Management Module[®] highlights the fields (output) that you selected in the Select Output section, making it easier for you to find the fields that you have chosen.

- 1. After you select your filters, click **Submit**.
- 2. After your report has been processed, click **Download Report** to open the report in Excel.

Saving Custom Reports

You can save your choices of fields and filters as a reusable custom report:

1. Make your selections for fields and filters for a custom report

2. Click the Save icon . The

The naming	dialog	box	displays:
------------	--------	-----	-----------

Please enter a name	×
Please enter a name:	
	Ok Cancel
	h,

- 3. Enter a name for your saved fields and filters
- 4. Click **OK**.

You can then Submit the report and download it.

Reusing custom report settings

You can re-use saved choices of fields and filters

1

- 1. Click the Upload icon
- . A list of saved custom report settings displays:

Please select a report from the list							
Name	Last Updated On						
Stephens4thReport	5/29/2018	0					
Stephens3rdCustomReport	5/29/2018	0					
Stephens2ndCustomReport	5/29/2018	8					
StephensProjectsStatus	5/29/2018	8					



2. Select a previously saved report from the list. The custom report fields and filter populate with your previous choices.

NOTE: You can revise the choices before you submit the report.

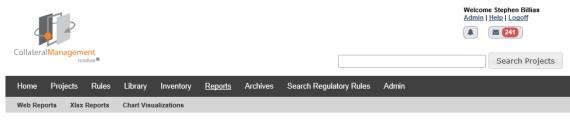
Chart Visualizations

You can view certain report data in seven highly configurable charts:

- Current Tasks By Subject
- Current Tasks By Department
- Current Tasks By Age By Department
- Daily Submissions
- Past Due By Stage
- Past Due Trend
- Material vs. Capacity Trend

NOTE: You must have Executive privileges in your CodySoft user profile to access these chart visualizations. If you are unsure of your user privileges, please contact your system administrator.

From the Reports menu, select Chart Visualizations:



Dashboard

The three "Current Tasks" charts (By Subject, By Department, and By Age By Department) display on the main screen:

1 Dashboard	× +		
← → ⊂ ŵ	I and https://analytics.codysoft.com	(80%) … 図 ☆	III\ ED
CODY <mark>SOFT.</mark>			Logout
Diag a Widget onto the destinout is drag one here to introve it. Day Submissions Day Submissions Part Due by Stage	Current Tarks By Sobject	The second secon	
Past Due Trend	Current Tasks By Age By Department TC27		

The four remaining charts are available on the left side of the screen.

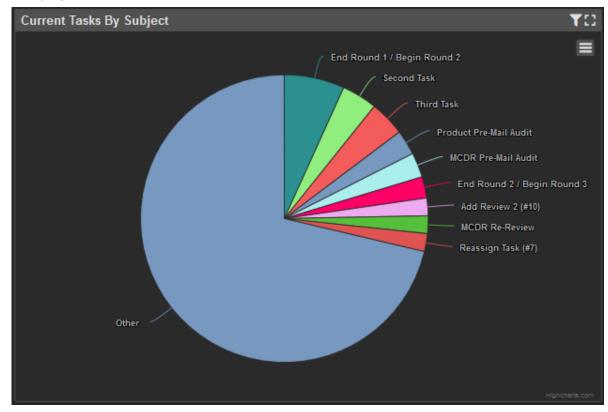
Click and drag any chart on the left to add it to the main display on the right. In addition to adding charts to the main display, you can move the charts around. You can also remove any chart by clicking and dragging from the right to the left.

Click **Save Layout** to save the organization of the display as the default view when you access Chart Visualizations.

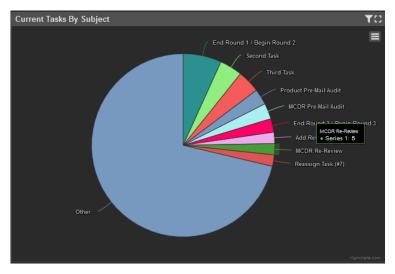
Each chart is described in detail in the following sections.

Current Tasks By Subject

The **Current Tasks by Subject** chart provides detail on the number of tasks in each stage of the schedule for projects:



Use this chart to analyze in which stage open project tasks are located. Hover over any task in the chart to see a count of the number of items in that category. For example, in the chart below, there are 5 tasks in MCDR Re-Review:



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Click the funnel icon to filter on a range of dates:

Current Tasks By Sub	oject		TC:	
Filter:	From	То	Apply	Reset

Click **Apply** to use the dates you have entered or click **Reset** to cancel out the field filters.

Click the Enlarge icon 🛅 to view a larger version of the chart.

Double-click on the chart to display the details in a spreadsheet format:

Current Tasks B	y Subject (Details)					Bur -					Ger Plas	biport Grid to CSV B
	Proj	ect				Drilled Into:	Title: Other 3) Tas	k			
									Original SLA			
			(no filter)	r			(no filter)	🍸 (no filter) 🌱		[_	
16	KD 07142017 1f	Active	08/30/2017	Initiate Review	kdrake+6@gop	InProcess	07/14/2017	07/14/2017	0		Compliance	0
16	KD 07142017 1f	Active	08/30/2017	Review One	cbelden@codyc	InProcess	07/14/2017	07/14/2017			BPO	
35	SBTest2 71617	Active	05/30/2018	TestAddTask53018	sbillias@codyco	InProcess	05/30/2018	05/30/2018			BPO	
13	JD Email Test 08	Active	01/30/2018	Template Review	avalenti@codyen	InProcess	01/04/2018	01/05/2018				
	JD Email Test 08	Active	01/30/2018	task8	avalenti@codyen	InProcess	01/05/2018	01/05/2018				
	TestLocked2 9-29	Active	05/30/2018	Start2ndrRundRvw	sbillias36@gmail	InProcess	05/30/2018	05/30/2018			BPO	
	TestLocked2 9-29	Active	05/30/2018	End2ndRndReview	sbillias36@gmail	InProcess	05/30/2018	05/30/2018			BPO	
5	KD 01032018a	Active	01/03/2018	Third Task	kdrake@gopmo	InProcess	01/03/2018	01/03/2018			Information Tech	
5	KD 01032018a	Active	01/03/2018	Template Review	kdrake@gopmo	InProcess	01/03/2018	01/03/2018			Information Tech	
5	KD 01032018a	Active	01/03/2018	Template Review.	kdrake@gopmo	InProcess	01/03/2018	01/03/2018			Information Tech	
	KD 01032018a	Active	01/03/2018	Template Review	kdrake@gopmo	InProcess	01/03/2018				Information Tech	
9	KD 01040218d	Active	01/09/2018	Third Task	kdrake@gopmo	InProcess	01/04/2018	01/04/2018			Information Tech	
9	KD 01040218d	Active	01/09/2018	Second Task	kdrake@gopmo	InProcess	01/04/2018	01/04/2018			Information Tech	
9	KD 01040218d	Active	01/09/2018	End Round 3 / B	kdrake@gopmo	InProcess	01/09/2018	01/09/2018			Information Tech	
0	JD_Test_01082018	Active	07/26/2018	TR Begin	avalenti@codyen	InProcess	03/27/2018	03/28/2018				
	KD 01092018b	Active	01/12/2018	Template Review	kdrake@gopmo	InProcess	01/10/2018	01/10/2018			Information Tech	
	KD 01092018b	Active	01/12/2018	Template Review	kdrake@gopmo	InProcess	01/12/2018	01/12/2018			Information Tech	
	KD 01092018b	Active	01/12/2018	Template Review	kdrake@gopmo	InProcess	01/12/2018	01/12/2018			Information Tech	
	KD 01092018b	Active	01/12/2018	Template Review	kdrake@gopmo	InProcess	01/10/2018	01/10/2018			Information Tech	
	KD 01092018b	Active	01/12/2018	Template Review	kdrake@gopmo	InProcess	01/12/2018	01/12/2018			Information Tech	
	Pre	rious		Page	1 🔋 of 13	251 Total	Matching Rows	20 Rows	:/Page ⊻		Next	

You can filter on any column, and you can use partial filtering on any column to retrieve data without an exact match

Note the record count at the bottom center of the screen that provides numeric detail on the results of a filtering action. You can filter on multiple columns to provide a targeted count, for example you could filter to obtain a count of all projects of a specified name with a specified task owner and task status.

Click Clear Filters to reset the spreadsheet.

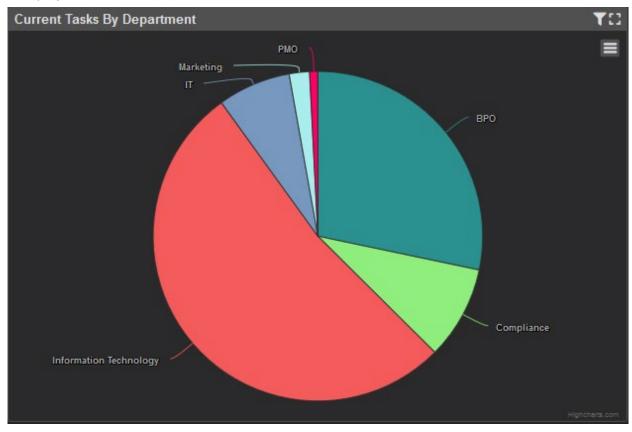
Click **Export Grid to CSV** to export a copy of data.

Use the **Previous** and **Next** buttons to navigate through the spreadsheet.

Click Back to return to the chart view.

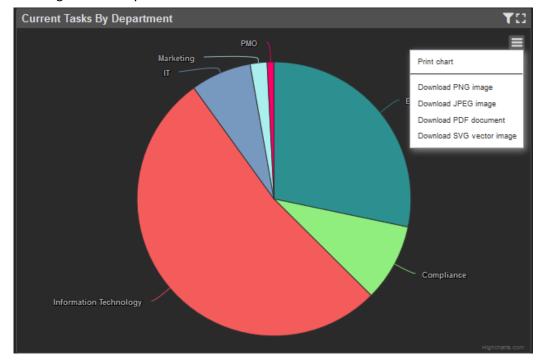
Current Tasks By Department

The **Current Tasks By Department** chart provides detail on the number of tasks in each stage of the schedule for projects:



Use this chart to analyze in which departments project tasks are located. You can filter on a range

of dates or enlarge the chart. Additionally, click the list icon to print the chart or download the chart as an image in a variety of formats:



Double-click on the chart to display the detail in a spreadsheet format:

You can filter on any column.

Click **Clear Filters** to reset the spreadsheet.

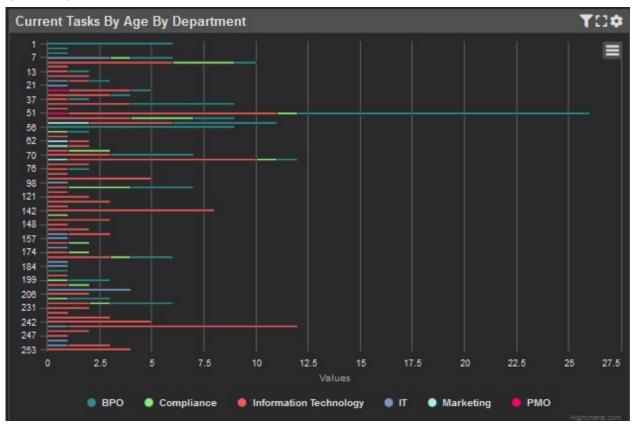
Click Export Grid to CSV to export a copy of data.

Use the **Previous** and **Next** buttons to navigate through the spreadsheet.

Click **Back** to return to the chart view.

Current Tasks By Age By Department

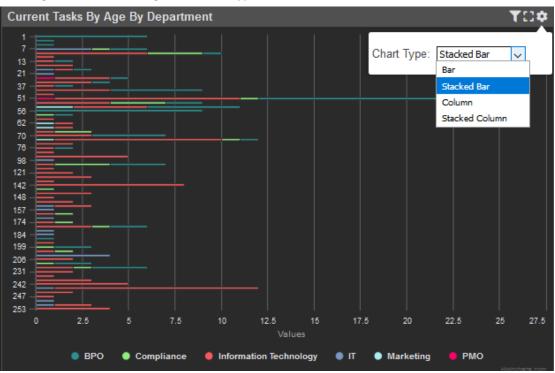
The **Current Tasks By Age By Department** chart provides detail on the number of project tasks owned by each department:



Use this chart to analyze where project tasks are located by department.

Click the button to next to a department name to exclude it from the chart. When a department is excluded, the button is greyed out and the data for that department does not display in the chart. You can exclude multiple departments to refine and narrow the chart data.

You can filter on a range of dates or enlarge the chart. Additionally, click the list icon to print the chart or download the chart as an image in a variety of formats.



Click the Settings icon 🔯 to change the Chart Type:

Double-click on the chart to display the detail in a spreadsheet format.

Daily Submissions

The **Daily Submissions** chart displays the number of new project submissions that are made each day and also how many tasks are in each stage of the projects:

Daily Submissions							3
< 7 < 3 < 1 Up to: 0	8/05/20	18		1	> 3	> 7 :	>
Dates:	3-/	Aug	4- <i>F</i>	\ug	5-Aug		Ĵ
Departments:	Mktg	All Other	Mktg	All Other	Mktg	All Other	Ŷ
Daily Cody Submissions			0	2	0	1	\uparrow
Initial Review Pending/Not Started		-	4	160	4	160	
Initial Review Pending/Not Started >1			2	177	2	176	
Initial Review: Current			8	393	8	394	
Initial Review: Past 10 day SLA			8	229	8	229	
Re-Review Pending/Not Started		-	9	232	9	232	
Re-Review Pending/Not Started >1 da			1	39	1	39	
In Re-Review: Current			1	188	1	188	
In Re-Review: Past 5 day SLA			1	176	1	176	
Todays Completed Initial Reviews	-	-	0	8	0	0	
Todavs Completed Re-Reviews	-	-	0	0	0	1	

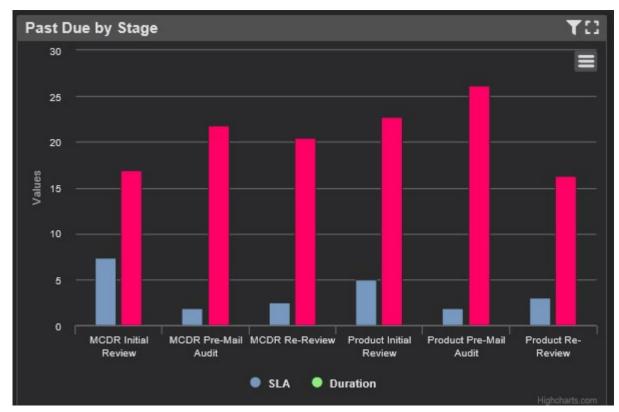
Use this chart to monitor new project submissions and to analyze which stage project tasks are in by date. The chart is divided into Marketing Department submissions and submissions by all other departments. In the **Up to:** field you can specify an end date for the data, to see submissions and project statuses up to a specific date.

Click Enlarge 🖸 to view a larger version of the chart.

Use the orange buttons to change the dates displayed by intervals of 1, 3, or 7 days in either direction.

Past Due By Stage

The Past Due By Stage chart provides a comparison between the established Service Level Agreement (SLA) for tasks and the actual time it took to complete the task.



Use this task to analyze in which stage projects are past due in relation to their SLAs. Columns in red indicate durations longer than the SLA. Columns in green indicate tasks for which SLAs are being met.

You can filter on a range of dates or enlarge the chart. Additionally, click the list icon 🗾 to print the chart or download the chart as an image in a variety of formats.

Double-click on the chart to display the detail in a spreadsheet format.

You can filter on any column.

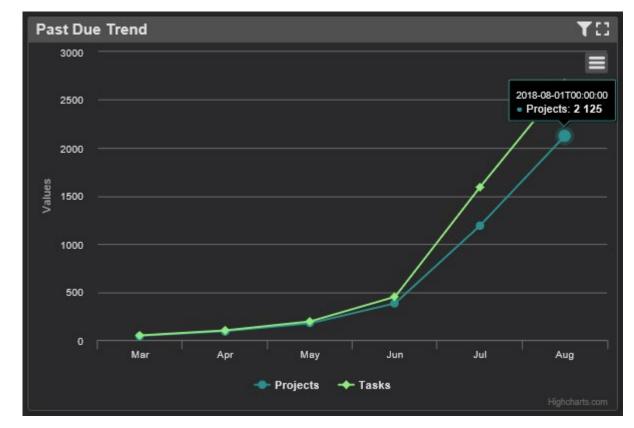
Click **Clear Filters** to reset the spreadsheet.

Click Export Grid to CSV to export a copy of data.

Use the **Previous** and **Next** buttons to navigate through the spreadsheet.

Click Back to return to the chart view.

Past Due Trend



The **Past Due Trend** chart displays the volume of tasks and projects over time.

Use this chart to analyze the trend in the number of projects and tasks that have exceeded their Past Due dates.

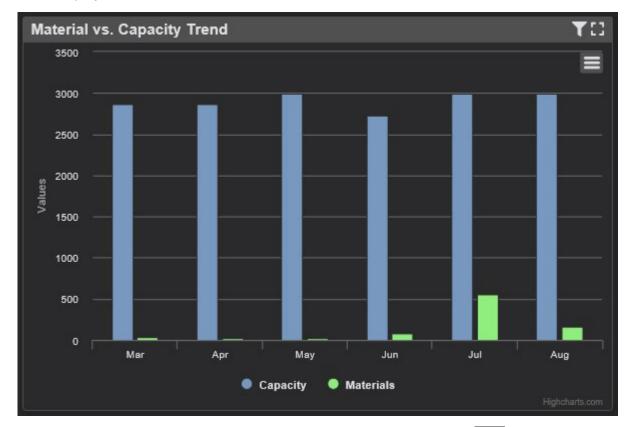
You can filter on a range of dates or enlarge the chart. Additionally, click the list icon **lime** to print the chart or download the chart as an image in a variety of formats.

Hover over a data point to see information on that point in the chart.

Double-click on the chart to display the detail in a spreadsheet format.

Material vs. Capacity Trend

The Material vs. Capacity Trend chart shows the volume of materials being worked as compared to the staff capacity for the work. Use this chart to analyze how capacity is trending in relation to the number of active projects.



You can filter on a range of dates or enlarge the chart. Additionally, click the list icon to print the chart or download the chart as an image in a variety of formats.

Hover over a data point to see information on that point in the chart.

Double-click on the chart to display the detail in a spreadsheet format.

Click **Export Grid to CSV** to export a copy of data.

Use the **Previous** and **Next** buttons to navigate through the spreadsheet.

Click **Back** to return to the chart view.

Logging out of Chart Visualizations

Click **Logout** in the upper right to exit from the Chart Visualizations program to logout of CodySoft completely. Click **Back** to return to the CodySoft Collateral Management application.

Kitting

Make assembling materials for printing and fulfillment easy with CodySoft[®]'s document kitting tool. CodySoft[®] bundles your production-ready documents with kit matrices and any other required data elements (such as membership files) for a simple transfer to your chosen vendor.

Creating a kit

- 1. From the dashboard, select Library.
- 2. From the Library choices, click Create Kit.
 - a. Name Enter the name of the kit.
 - b. Creation Date Enter the date you create the kit.
 - c. Versions tab Click Add Version to select from the list of Final Versions that are stored in CodySoft[®].
 - i. After selecting versions, click **OK**.
 - ii. (Final Versions are versions that have been approved and finalized. Their status is set to "Completed" by the Traffic Manager.)
 - d. Attachments tab Click Add Attachment for pop-up window to appear.
 - i. From the **File to Upload** field, click **Browse** to select the file to upload from your computer.
 - ii. After selecting the file, click **Open**.
 - iii. (Attachments are any files you choose to include in the kit from your computer or network.)
- 3. Click Exit.

Editing a kit

- 1. From the dashboard, select Library.
- 2. From the Library choices, click Document Kits.
- 3. Click the name of the kit you want to edit. The **Edit Kit** screen appears.
- 4. You can edit kit components as detailed in *Creating a kit*.

Downloading a kit to a Zip file for transfer to a print vendor

- 1. In Edit Kit, click Download. The Zip file window appears.
- 2. Select Save File
- 3. Click **OK**.
- 4. The kit contents are saved as a Zip file and downloaded to your computer. You can access this Zip file from where you store your downloads.

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:

I Home	×	J Port	al - CodySoft	×	+		-		×
\leftrightarrow \rightarrow C $\hat{\bullet}$ support.	codysoft	.com/Mai	n/Default.asp	or?searchtext=Pl	bp#hor	neSearchBox	☆		÷
Apps 📀 Portal - CodySoft	t								
						Login Register I	English	•	
CODYSOR	=Te		ו						
Home Search the		owledge	Base	Tickets					
Enter Search Criteria	D,					Search			

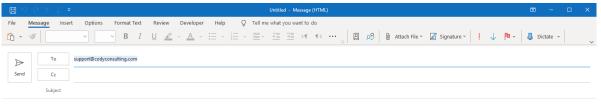
- 2. From the Support Portal home screen you have three choices:
 - a. Knowledge Base
 - b. Tickets
 - c. Search the Portal

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:



BRIEF DESCRIPTION of the issue you are having: <Insert description below>

WHICH MODULE are you in (if not CM)?: <Insert module below>

THE PROJECT AND TEMPLATE (if applicable) you are working in (for example, Project 5, template EOC2020Test): <Insert project and template information below>

WHICH BROWSER you are using? If you have tried in other browsers and get the same error, please include those browsers as well.: <Insert browser(s) below>

SCREENSHOT and/or video of the issue if it helps illustrate the issue you are experiencing, including the date/time from your taskbar.: </

After submitting 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.

- 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.



PBP Module User Guide PBP Module Reference Materials