

CodySoft Review Process for Project Managers

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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-by-step instructions for common module activities. If you have questions, please contact your CodySoft® administrator.

Accessibility

 server@codysoft.net
To: [Redacted]

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: [Redacted]

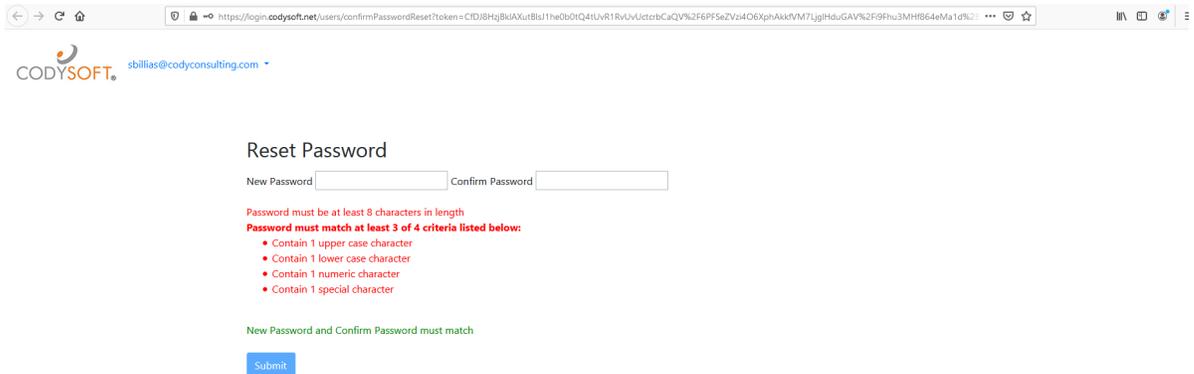
[Please click here to confirm your email address](#)

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.



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

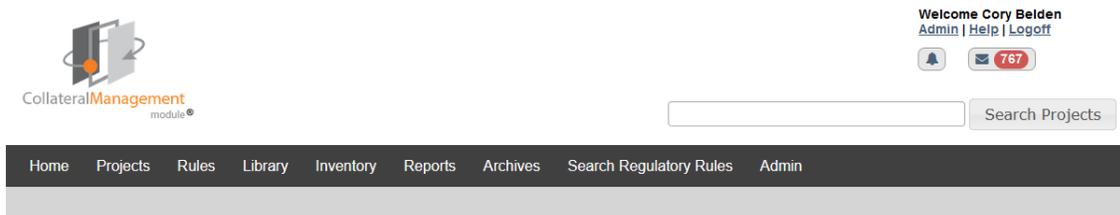
2. In the New Password field, enter a **new password**. Follow the instructions for meeting the password requirement.
3. In the Confirm Password field, enter the **new password** again.
4. Click **Submit**. The login screen displays.

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.



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
153	CY23 MAPD HMO ANOC	ANOC	InProgress	5/31/2022	Al Valenti	4/7/2022	6/8
149	Exhibit 4e: Model Notice of Enrollment Letter	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
140	CY22 DSNP EOC	EOC	InProgress	12/31/2021	Cory Belden	11/3/2021	1/3
134	CY22 DSNP ANOC	ANOC	InProgress	9/30/2021	Al Valenti	9/20/2021	2/4
133	PY2022 Marketplace EOC	EOC	Approved	10/29/2021	Al Valenti	9/20/2021	0/0
109	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.

Review Process for Project Managers

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 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:



The screenshot shows a navigation bar with tabs: Details, Tasks, Discussions, Rules, Templates (selected), Versions, Attachments, Compliance, and Analyze. Below the navigation bar is a section titled "Add Template" with a dropdown menu for "Active Templates". The table below shows one active template:

No	Name	Type	Status	Created By	Created On	Updated By	Last Updated				
1	Sample Template	CodySoft Editor	Draft	Cory Belden	05/11/2022	Cory Belden	05/11/2022				

Below the table is a section for "Cancelled Templates". A red arrow points to the Template Review icon in the table row.

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
0%

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: Edit File Markup Tool

Plan Number: Base Template Cancel Begin Review

Month Day Fullscreen Select Columns

Assignee	# of Days	Progress	Status	Planned	Actual	07 May	08 May	09 May	10 May	11 May	12 May	13 May	14 May	15 May	16 May	17 May	18 May
	2	0%		1h	0h												
Cory Belde	2	0%		1h	0h												

- 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.
- Click **Begin Review**. A confirmation message displays, click Ok.

The screenshot shows a 'Confirmation' dialog box with a close button (X) in the top right corner. The dialog contains the text: 'Are you sure?' followed by 'When you begin the review, tasks will be automatically assigned and reviewers will be notified by email.' At the bottom of the dialog are 'Ok' and 'Cancel' buttons. In the background, the 'Template Review - Sample Template' interface is visible, showing the 'Edit Method' set to 'Markup Tool' and the 'Plan Number' set to 'Base Template'. The task list table from the previous image is also visible in the background.

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	!	+			AND
0%	InProcess	1h	0h	!	+			AND
100%	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 x

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  Cancel

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.

The screenshot shows a web interface with two tabs: 'Template Reviews' and 'Version Reviews'. The 'Review Summary' section is active, showing a table for 'Reviews in Progress' and a section for 'Review Tasks'.

Review Summary

Reviews in Progress

Name	Template Type	Review Method	Review Round	Reviews Complete	Unlock File	Mark Complete
SB Test Review 6-9-16	Base Template	Routing	1	0 / 1		Mark Complete

Reviews Completed

Review Tasks

Tasks - Active Reviews

Template	Review Round	Name	Start Date	End Date	Edit Method	
SB Test Review 6-9-16	1	Test Review	6/16/2016	8/1/2016	Edit File	<input type="checkbox"/>

Tasks - Completed 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. Marking this review as complete will also set all in-progress review tasks as complete.

Ok Cancel

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 for 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

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

Copy project Cancel Project Complete On Hold Exit Save

Details Tasks Discussions Rules Templates Versions Reviews Attachments Compliance Analyze

Import Tasks Export Tasks To File

Month Day Fullscreen Select Columns Send Notifications

Assignee	# of Days	Progress	Status	Planned	Actual		M:09	M:10	M:11	M:12	M:13	M:14	M:15	M:16	M:17	M:18	M:19	M:20	M:21	M:22
Al Valenti	3	100%	Complete	2h	0h															
Cory Belde	3	100%	Complete	2h	1.25h															
Cory2 Beld	4	100%	Complete	3h	0h															
Cory Belde	4	100%	Complete	3h	1h															
	3	100%	Complete	3h	0.816															
Cory Belde	3	100%	Complete	1h	0.416															
Assignee	Complete	Workload					M:09	M:10	M:11	M:12	M:13	M:14	M:15	M:16	M:17	M:18	M:19	M:20	M:21	M:22
Cory Belden	70%	195.183333					19.2	8.60	29.6	30.4	33.5				0.27	1.27	0.27	1.27	10.0	
Saurabh Sharma	45%	110h							26.6	26.6	26.6				10.0				10.0	
Corv2 Belden2	62%	168.5h					17.6	0.68	27.3	29.1	31.5				10.8	0.51	0.01	0.01	10.0	

- 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

Planned hours
10

Actual hours
0

Progress
0%

Description
Sample Review Description

Task will be deleted permanently, are you sure?

OK Cancel

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.

The screenshot shows a web interface for creating a review. At the top, there are navigation tabs: Home, Projects, and Rules. Below this is a header for 'Template Review - 2022'. The main form area has a 'Create from' section with two radio buttons: 'New Review' (selected) and 'Use Previous Round' (highlighted with a red box). Below this is a 'Task name' field containing 'New task'. There is also an 'Assignee' field with a dropdown arrow and a 'Start date' field.

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):

The screenshot shows a 'Review Summary' section with two tabs: 'Template Reviews' and 'Version Reviews'. Below the tabs is a table titled 'Reviews in Progress'.

Name	Version Type	Review Method	Review Round	Created By	Created On	Reviews Complete	Unlock File	Mark Complete
Medicare_2022_H1234_002_HMO_Medicare Advantage_Silver_EOC	002 - H1234	Concurrent	1	Cory Belden	03/07/2022	0 / 4		Mark Complete
Medicare_2022_H1234_003_HMO_Medicare Advantage_Silver_EOC	003 - H1234		1	Cory Belden	05/10/2022	3 / 3		Mark Complete
H1234-002	002 - H1234		3	Cory Belden	05/11/2022	0 / 41		Mark Complete
Medicare_2022_H1234_002_Medicare	002 -		~	Gaurav	05/11/2022	0 / 11		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).

Details Tasks Discussions Rules Templates Versions Reviews Attachments Compliance Analyze

▼ Active Versions

Please select the document(s) for download

<input type="checkbox"/>	File Name	Plan Number	Contract Number	Template#/RevDate /Version# View	Created By	Created On	Status			
<input type="checkbox"/>	Medicare_2022_H1234_002_HMO_Medicare_Advantage_Silver_EOC	002	H1234	2_04152022_2	Cory Belden	04/15/2022	Draft			
<input type="checkbox"/>	Medicare_2022_H1234_003_HMO_Medicare_Advantage_Silver_EOC	003	H1234	2_05062022_3	Cory Belden	05/06/2022	Draft			
<input type="checkbox"/>	Medicare_2022_H1234_002_HMO_Medicare_Advantage_Silver_EOC	002	H1234	2_05062022_4	Cory Belden	05/06/2022	Draft			
<input type="checkbox"/>	Medicare_2022_H1234_002_HMO_Medicare_Advantage_Silver_EOC	002	H1234	2_10012021_1	Attila Kozma	10/01/2021	Draft			
<input type="checkbox"/>	H1234-003	003	H1234	5_02172022_3	Cory Belden	02/17/2022	Draft			

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.

▼ Active Versions

Change document(s) status to: Cancelled **Bulk Review** Download selected document(s)

Original Format

<input type="checkbox"/>	File Name	Plan Number	Contract Number	Template#/RevDate /Version# View	Created By	Created On	Status			
<input type="checkbox"/>	Medicare_2022_H1234_002_HMO_Medicare_Advantage_Silver_EOC	002	H1234	2_04152022_2	Cory Belden	04/15/2022	Draft			
<input type="checkbox"/>	Medicare_2022_H1234_003_HMO_Medicare_Advantage_Silver_EOC	003	H1234	2_05062022_3	Cory Belden	05/06/2022	Draft			
<input type="checkbox"/>	Medicare_2022_H1234_002_HMO_Medicare_Advantage_Silver_EOC	002	H1234	2_05062022_4	Cory Belden	05/06/2022	Draft			
<input type="checkbox"/>	Medicare_2022_H1234_002_HMO_Medicare_Advantage_Silver_EOC	002	H1234	2_10012021_1	Attila Kozma	10/01/2021	Draft			
<input checked="" type="checkbox"/>	H1234-003	003	H1234	5_02172022_3	Cory Belden	02/17/2022	Draft			
<input type="checkbox"/>	H1234-002	002	H1234	5_02172022_4	Cory Belden	02/17/2022	Draft			

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:



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.