

## CodySoft January 19<sup>th</sup> 2024 release notes:

### PBP Module:

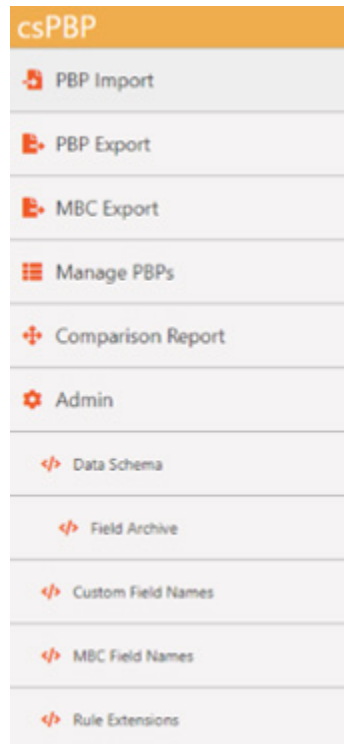
1. Changed global nomenclature to standardize and align newer terms across the module (e.g., menu navigation pane, screen names, instructions, drop down selections).

Previous Term	New Term
Custom Field, User Generated Field	Data Grid Field
Not Custom, PBP Report	Bid
MBC Field	Rules Grid Field
Previous Year (PY)	This Year (TY)
Current Year (CY)	Next Year (NY)
Past Import	Completed Import
Field Lookup Headers	Field Headers

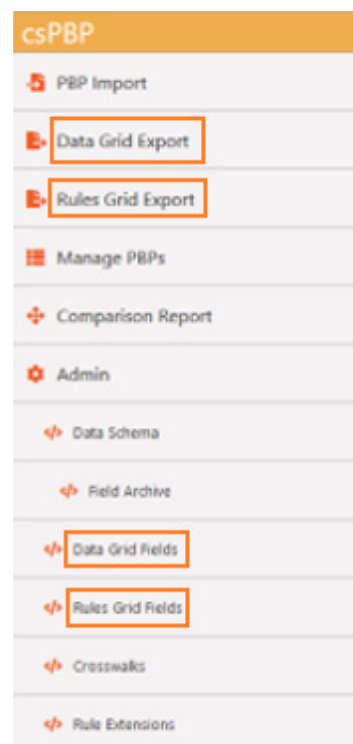
### EXAMPLES

#### Menu names:

##### Previous



##### New



## Data Grid Fields screen (previously Custom Field Names screen):

Data Grid Fields

### Fields

Find an Existing Data Grid Field to Edit or Add a Rule Transformation, or Click "New Field" to create new Data Grid Field

Filter Fields

Browse Existing Fields

Global Find & Replace Update Field Headers New Field

Field Header	Field Name	Origin	Plan Types	Updated By	Updated On	Created By	Created On	Actions
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## Edit Rule screen dropdown naming for Data Grid Fields and Rules Grid Fields:

### Previous

What is the base value?

Use Value Directly from PBP Report

A field taken from the PBP

nonMedicare

Clear

Advanced Search

bdCopaymentAmountYesNoMinMax Benefit Details > MC > 3-1: Cardiac Rehabilitation Services > CopaymentComponent

**Actual Name:** bdCopaymentAmountYesNoMinMax

**Description:** Is there a copayment?

**Header:** Benefit Details > MC > 3-1: Cardiac Rehabilitation Services > CopaymentComponent

**Json Path:** \$.pbp[0].benefitDetails.benefitDetailsInfo[? (@.categoryTypeId=='1' && @.categoryCode=='3-1')].benefitDetails.CopaymentComponent

**Custom Field?:** null Field

**Options:**

Yes

No

Yes with a min & max

### New

What is the base value?

Use Value Directly from Bid

A field taken from the PBP

bdDentalCoinsurancePerYesNoMinMax

Clear

Advanced Search

bdCoinsuranceAmountYesNoMinMax Benefit Details > MC > 3-1: Cardiac Rehabilitation Services > CoinsuranceComponent

**Actual Name:** bdCoinsuranceAmountYesNoMinMax

**Description:** Is there a coinsurance?

**Header:** Benefit Details > MC > 3-1: Cardiac Rehabilitation Services > CoinsuranceComponent

**Json Path:** \$.pbp[0].benefitDetails.benefitDetailsInfo[? (@.categoryTypeId=='1' && @.categoryCode=='3-1')].benefitDetails.CoinsuranceComponent

**Field Type:** Bid Field

**Options:**

Yes

No

Yes with a min & max

## Advanced Search field type selection:

### Previous

**Advanced Search**

Header Name:

Field Name:

Description:

Custom?:  
☒ All ☐ Custom Field ☐ Not Custom

### New

**Advanced Search**

Header Name:

Field Name:

Description:

Field Type?:  
☒ All ☐ Data Grid Fields ☐ Bid Fields

2. Revised **New Import** selection type descriptions
  - a. Removed reference to PBP XML Reports in second option

### Previous

**PBP Import**

☒ Plan Json  
(Import one or more Plan Json Reports in ZIP format)

☐ PBP Reports or Companion Data  
(Import one or more PBP XML Reports or additional companion data XLSX file in ZIP format)

☐ Override existing Custom Field Names  
(Import one CodySoft data grid [template](#) with one or more plan columns to bulk override existing Custom Field Names.)

☐ Create or fully Replace all PBP Plan Custom Field Names  
(Import one CodySoft data grid [template](#) with one or more plan columns to fully replace and override existing Custom Field Names.)

Next

### New

**PBP Import**

☒ Plan Json  
(Import one or more Plan Json files in ZIP format)

☐ Companion Data  
(Import Companion Data XLSX file contained in ZIP format)

☐ Override existing Data Grid Field Names  
(Import one CodySoft data grid [template](#) with one or more plan columns to bulk override existing Data Grid Field Names.)

☐ Create or fully Replace all Data Grid Field Names  
(Import one CodySoft data grid [template](#) with one or more plan columns to fully replace and override existing Data Grid Field Names.)

Next

3. Added a 5<sup>th</sup> option for version comparison in Data Grid Export screen.

### Data Grid Export

Which versions should be included?

☐ Just the Latest Version

☐ Also Include Previous Versions (Cannot Publish to CM)

☐ Latest Versions for each Year

☐ Specific Year

☒ Latest Versions for TY/NY

- a. Select **Latest Versions for TY/NY** to export a file with TY (This Year) and NY (Next Year) variants. These variants align with Contract Year 2025 CODY Templates for use in the CodySoft® Collateral Management (CM) module.

	A	B	C	D	E	F	G
1			PlanName	004(H5221)	004(H5221)	001(H7871)	001(H7871)
2		Year	Variant	TY	NY	TY	NY
3	PBP Section	Field Description	Attribute				
4	Section A	contractYear	Plan_Year	2023	2024	2023	2024

4. Added JSON Bid fields that now permit Data Grid Field creation for optional supplemental benefits, VPID benefits, and additional telehealth benefits

### EXAMPLE BID FIELDS

**Optional supplemental benefits** (Package numbers and service category benefits):

<b>optSupNotes</b> Cost Share Groups > optionalSupplementalPackages > optSupPackagesData > 1
<b>optSupPkgDesc</b> Cost Share Groups > optionalSupplementalPackages > optSupPackagesData > 1
<b>optSupPkgId</b> Cost Share Groups > optionalSupplementalPackages > optSupPackagesData > 1
<b>optSupPkgName</b> Cost Share Groups > optionalSupplementalPackages > optSupPackagesData > 1
<b>optSupPkgStatus</b> Cost Share Groups > optionalSupplementalPackages > optSupPackagesData > 1
<b>categoryCode</b> Cost Share Groups > optionalSupplementalPackages > optSupPackagesData > 1 > benefitPackages > 16a3: Fluoride Treatment

### **Additional Telehealth PickList:**

<b>bdAdditionalTelePartBPickList</b> Benefit Details > MC > 7j: Additional Telehealth Benefits > AdditionalTelePartBComponent	
<b>Actual Name:</b>	bdAdditionalTelePartBPickList
<b>Description:</b>	Select the Medicare-covered benefits that may have Additional Telehealth Benefits available
<b>Header:</b>	Benefit Details > MC > 7j: Additional Telehealth Benefits > AdditionalTelePartBComponent
<b>Json Path:</b>	\$.pbp[0].benefitDetails.benefitDetailsInfo[?(@.categoryTypeld=='1' && @.categoryCode=='7j')].benefitDetails.AdditionalTelePartBComponent
<b>Field Type:</b>	Bid Field
<b>Options:</b>	<div>Inpatient Hospital Services Inpatient Hospital-Acute Inpatient Hospital Psychiatric Skilled Nursing Facility (SNF) Cardiac and Pulmonary Rehabilitation Services Cardiac Rehabilitation Services</div>

## VBID Additional Benefits, Reduction in Cost Sharing, Rewards and Incentives Rebates (Package numbers, VBID type, and service category benefits):

<b>bdNotes</b>	VBID > vbidAdditionalBenefits > vbidAdditionalBenefitsPackages > VBID > 1 > benefitPackages > non-MC > 10b1: Transportation Services - Plan Approved Health-related Location > benefitDetailsData > AddNotesComponent
<b>bdBenefitUnlimitedPeriodicity</b>	VBID > vbidAdditionalBenefits > vbidAdditionalBenefitsPackages > VBID > 1 > benefitPackages > non-MC > 10b1: Transportation Services - Plan Approved Health-related Location > benefitDetailsData > BenefitUnlimitedComponent
<b>bdBenefitUnlimitedYesNo</b>	VBID > vbidAdditionalBenefits > vbidAdditionalBenefitsPackages > VBID > 1 > benefitPackages > non-MC > 10b1: Transportation Services - Plan Approved Health-related Location > benefitDetailsData > BenefitUnlimitedComponent
<b>bdIndicateNumOfVisit</b>	VBID > vbidAdditionalBenefits > vbidAdditionalBenefitsPackages > VBID > 1 > benefitPackages > non-MC > 10b1: Transportation Services - Plan Approved Health-related Location > benefitDetailsData > BenefitUnlimitedComponent
<b>bdCoinsuranceAmountYesNoMinMax</b>	VBID > vbidAdditionalBenefits > vbidAdditionalBenefitsPackages > VBID > 1 > benefitPackages > non-MC > 10b1: Transportation Services - Plan Approved Health-related Location > benefitDetailsData > CoinsuranceComponent
<b>bdCoinsuranceMaxAmount</b>	VBID > vbidAdditionalBenefits > vbidAdditionalBenefitsPackages > VBID > 1 > benefitPackages > non-MC > 10b1: Transportation Services - Plan Approved Health-related Location > benefitDetailsData > CoinsuranceComponent

5. Added option for **customizable formatting of segment number** in Data Grid Export
  - a. Choose one, two, or three digits for a non-zero segment number in the Data Grid.

		PlanName	004(H5221)	004(H5221)	017-001(H3124)	017-001(H3124)	017-01(H3124)	017-01(H3124)	017-1(H3124)	017-1(H3124)
	Year	Variant	TY	NY	2023	2024	2023	2024	2023	2024
PBP Section	Field Description	Attribute								
Section A	contractYear	Plan_Year	2023	2024	2023	2024	2023	2024	2023	2024
Section A	Plan name	Plan_Name	MA Plan Name (HMO)	MA Plan Name (HMO)	MAPD Plan Name (PPO)	MAPD Plan Name (PPO)	MAPD Plan Name (PPO)	MAPD Plan Name (PPO)	MAPD Plan Name (PPO)	MAPD Plan Name (PPO)
Section A	Segment #	Segment	0	0	1	1	1	1	1	1

6. Changed the **Time Period options** for Rules Grid Fields from Previous Year (PY) and Current Year (CY) to This Year (TY) and Next Year (NY)

**What is the base value?**

Use Pre-Existing Value From **Data Grid Fields Library**

A field taken from Data Grid

Field

Select Time Period

How should this value be adjusted?

Apply a Format

Apply a Rule Extension

NOT EQUALS

**What is the base value?**

Use Pre-Existing Value From **Rules Grid Fields Library**

A field taken from Rules Grid

Field

How should this value be adjusted?

Apply a Format

Apply a Rule Extension

- a. Select **This Year** Time Period to pull values from current contract year plan data.
- b. Select **Next Year** Time Period to pull values from upcoming contract year plan data.

**What is the base value?**

Use Pre-Existing Value From Data Grid Fields Library

A field taken from Data Grid

Field

This Year

Next Year

Abbreviations displayed after selecting This Year or Next Year:

Data Grid Field > 1a Inpatient Hospital Acute - MC - OON > IPHA\_OON

TIMEPERIOD: TY

EQUALS

The value: "x"

AS-IS

Data Grid Field > 1a Inpatient Hospital Acute - LRD - OON > IPHA\_LRD\_OON

TIMEPERIOD: NY

EQUALS

The value: "x"

AS-IS

7. Removed “Export failed” error message when importing a plan that doesn’t have previous year data
  - a. The system will no longer require a plan to have previous year data to complete the Rules Grid Export process

