

Plan **Benefit Package**
module®

User Guide

For use with application release January 19, 2024

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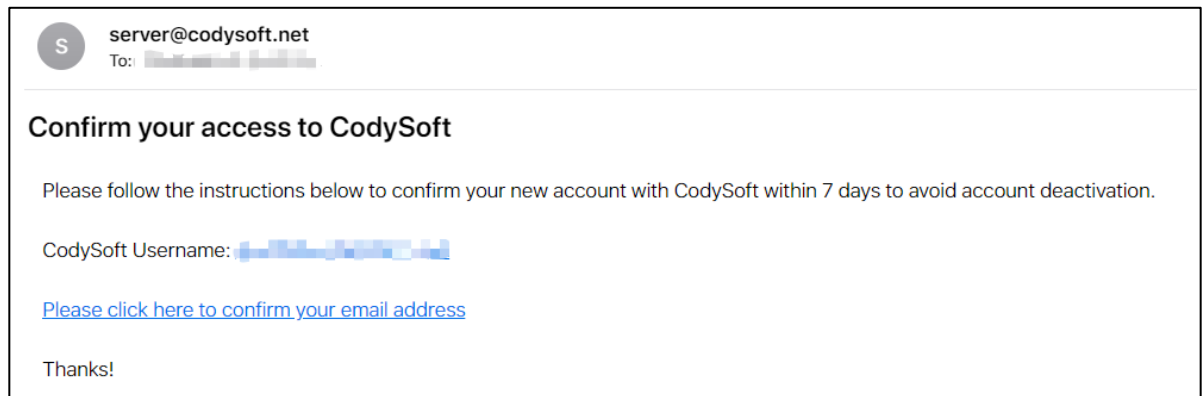
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Overview

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

Accessibility



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.

The screenshot shows the CodySoft login page with the URL 'https://login.codysoft.net/users/confirmPasswordReset?token=CIDjBHzjBkIAxutBls1he0b0iQ4tUvR1RvUvUctorbCaQV%2F6P56zVz4C06XphAKkVVM7UgHduGAV%2F9Fu3MH864eMa1d%3A...'. The page title is 'Reset Password'. It has two input fields: 'New Password' and 'Confirm Password'. Below the fields, a red message states: 'Password must be at least 8 characters in length. Password must match at least 3 of 4 criteria listed below:'. The criteria are: 'Contain 1 upper case character', 'Contain 1 lower case character', 'Contain 1 numeric character', and 'Contain 1 special character'. A green message below says: 'New Password and Confirm Password must match'. A blue 'Submit' button is at the bottom.

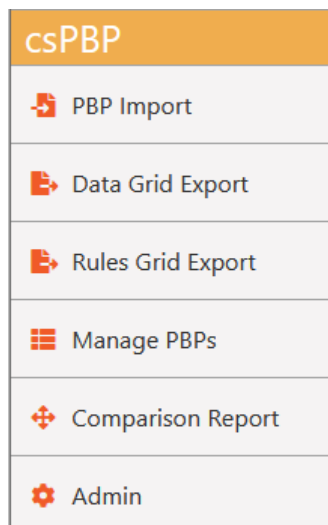
2. In the New Password field, enter a **new password**. Follow the instructions for meeting the password requirement.
3. In the Confirm Password field, enter the **new password** again.
4. Click **Submit**. The login screen displays.
5. Enter your **user name**

6. Enter the **password** you just created
7. Click **Sign in**. You are logged in to the main dashboard of CodySoft.
8. Click **Launch csPBP** to begin working in that module.

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.

PBP Module Functionality

The PBP Module has six main areas of functionality:



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

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

- **Rules Grid Export**—Outputs a rules grid Excel file with “x” automatically populated in applicable cells.
- **Manage PBPs**—Where you can make changes to the data in PBPs you’ve imported, view data grid field costs and phrasing and/or Bid Report JSON fields, or remove PBPs from the list. See *Manage PBPs*.

- **Comparison Report**—Where you can compare PBPs 1:1 or 1: many.
- **Admin**—Setup and definition tools to manage the structuring of the data:
 - Data Schema
 - PBP Schemas
 - Companion Data Schemas
 - Field Archive
 - Data Grid Fields
 - Rules Grid Fields
 - Crosswalks
 - Rule Extensions

PBP Workflow Overview

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

The workflow consists of three major components:

Inputs

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

PBP Module Data Processing

- Upload the latest CMS API Download Schema under *Global JSON PBP Schema*. The schema are templates that tell CodySoft® what variable PBP benefit elements to transform or pass through untouched.
- Upload Companion Data schema files with information not in the bid reports, such as premiums.
- Create rules and fields that auto-transform data when the JSON bid reports are imported. These rules are specific to Contract, Plan ID, and benefit element.
- Import bid data and associated companion data.
- Edit the imported and transformed bid reports and save them.
- The system captures year-over-year benefit changes and other member benefit data direct from the JSON bid files.

Outputs

- Data Grid Export of benefit data in a variety of formats, for use by the plan in creating documents and reviewing bid entry. This output include the ability to export a XLS file to CodySoft® Collateral Management (CM) module as an asset.
- Rules Grid Export that captures year-over-year benefit changes and JSON bid data for next contract year. This output includes the ability to export a XLS file to CodySoft® Collateral Management (CM) module as an asset.

In August of each year, health plans receive final approval of their bids after actuarial and CMS review. Typically, these changes are differences in copayment, coinsurance, or plan benefit maximum amounts. The final step in the workflow is to resolve the differences between the transformed data from the June JSON bid reports and the new JSON files in August. The final output files are used to update the ANOCs, EOCs, and other documents that use the JSON data.

Steps in the PBP Workflow

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

1) Add Schemas

First, you need to provide the PBP Module with the latest *CMS API Download Schema*. You need to take this step only once, at the beginning of each plan year. A good time to do this is when CMS releases its beta software at the beginning of the contract year. That beta software identifies what benefits have been added, deleted, or split into multiple benefits. See *Data Schema*.

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

2) Develop Transformation Rules

Next, create new rules or edit existing transformation rules to account for changes to benefits. For example, you may use different names for your benefits than those used by CMS and need to write rules to automatically change the benefit names. You may also want to customize the phrasing of a benefit description so that it reads well in a particular document. This work of creating or editing rules may be ongoing throughout the summer.

NOTE: Rule changes go into effect (the rules are applied) when you import PBPs. If you add or change a rule after import, it will not affect an imported plan unless you reprocess the plan against the latest set of rules. See *Data Grid Fields*.

3) Import PBPs

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

- **The testing phase.** Check to see how the Data Grid Fields have been applied to the plan bid data. Add new rules or edit the existing rules in a field you have created, if necessary. You can delete any In-Progress import and reimport the PBP JSON files if needed. Whatever changes you have made to the Data Grid Fields will be applied to the new import. This may be an iterative process of importing, testing your fields, and deleting and re-importing, as necessary.

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

- **The committal phase.** When you are satisfied with the import's data, you confirm and commit the plans to the database. See *PBP Import*.

4) Manage PBPs

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

It may be judgment call to decide whether there were enough Data Grid Field changes to warrant a new import (replacement file) of a previously completed plan or set of plans. For example, if you have only a few changes, you may want to just revise rules, edit the plan benefit data in Manage PBPs, and then reprocess selected plans against the latest set of rules. However, if you have many changes that require you to create or edit multiple rules, then it may be worthwhile to upload a replacement file.

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

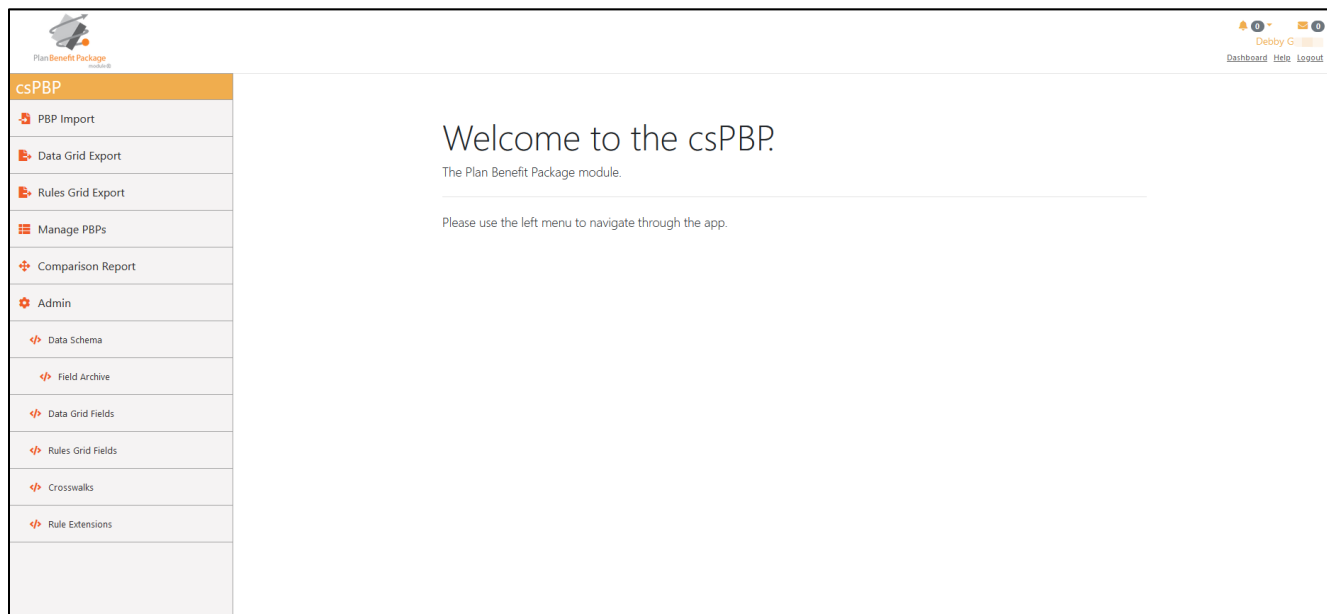
5) Export PBPs

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

See *Data Grid Export*.

Navigation

When you log in, the home screen displays, and a Menu displays on the left:



Select an item in the Menu to take you to the main screen for a particular function.

PBP Import

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

1. Select **PBP Import**. The list of In-Progress Imports and Completed Imports displays:

The screenshot shows the csPBP PBP Import interface. On the left is a sidebar with navigation options: PBP Import, PBP Export, MBC Export, Manage PBPs, Comparison Report, Admin, Data Schema, Field Archive, Custom Field Names, MBC Field Names, Crosswalks, Rule Extensions, Migrations, and Field Import/Export. The main content area is titled 'PBP Import' and contains two sections: 'In-Progress Imports' and 'Completed Imports'.

In-Progress Imports Table:

Name	Updated On ↓	Updated By	Created On	Created By	File Name	Status	Actions
CY24 H1234-002	1/16/24	Debby Golonka	1/16/24	Debby Golonka	CY24 HMOPOS.zip	InProgress	
CY24 H1234-001	1/16/24	Debby Golonka	1/16/24	Debby Golonka	CY24 HMO.zip	InProgress	
CY24 H1234-004 / S1234-005	1/16/24	Debby Golonka	1/16/24	Debby Golonka	CY24 PPO_PDP.zip	InProgress	

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Completed Imports Table:

Name	Updated On ↓	Updated By	Created On	Created By	File Name	Status	Actions
CY23 H1234-002	1/16/24	Debby Golonka	1/16/24	Debby Golonka	CY23 HMOPOS.zip	Complete	
CY23 H1234-001	1/16/24	Debby Golonka	1/16/24	Debby Golonka	CY23 HMO.zip	Complete	
CY23 H1234-004 / S1234-005	1/16/24	Debby Golonka	1/16/24	Debby Golonka	CY23 PPO_PDP.zip	Complete	
5_2024	12/4/23	Nick Scalfone	12/4/23	Nick Scalfone	5.zip	Complete	
H3409_2024	12/4/23	Nick Scalfone	12/4/23	Nick Scalfone	H3409_004_2024.zip	Complete	
S6496_001_2024	12/4/23	Nick Scalfone	12/4/23	Nick Scalfone	S6496_001_2024.zip	Complete	
H4183_H6007	12/4/23	Nick Scalfone	12/4/23	Nick Scalfone	H4183_H6007_2024.zip	Complete	

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

- **In-Progress Imports**—Contains plans that you are still reviewing; this may include imports of plans that you have already completed. You can use in-Progress imports as a staging area to test your imported JSON files without committing them to the database. You can also delete any In-Progress imports that you do not want to finalize.

1. Click the edit icon on any In-Progress Import to resume the import.


This screenshot shows the 'In-Progress Imports' table. The third row, 'CY24 H1234-004 / S1234-005', has its 'edit icon' (a pencil) highlighted with a yellow box. Below the table, the text '1. 2.' is visible, indicating the first and second items in the list.

- The Import opens, with the number of items requiring review identified in the upper left:

The screenshot shows the 'PBP Import' screen. At the top, it says '2 Items Require Review.' Below this is a table with columns: Contract Number, Plan ID, Segment ID, Current Year, Status, and Actions.

Contract Number	Plan ID	Segment ID	Current Year	Status	Actions
H1234	004	0	2024	In-Progress	Review Fields
S1234	005	0	2024	In-Progress	Review Fields

2. Click the trash can icon if you want to abandon an in-progress import.

- **Completed Imports**—Contains all previously imported plans, both those that have been imported without testing and those that have already been reviewed at least once during the import process. All completed import plans are committed to the database, where they are available in the Manage PBPs section of the application.
 1. Click the undo icon  to undo a past import. The import is moved back to the in-progress list and you can process it using the latest rules. A warning message displays to confirm that you want to undo the past import and warns that the Undo will fail if there are plans in the import with more recent data than that in the import.

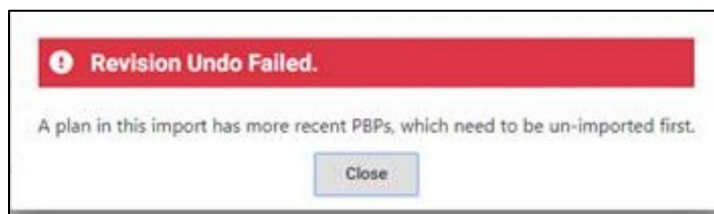
Undo Completed Import

Are you sure you wish to undo this import? This operation will fail if it contains plans with more recent data. The reverted import will be put back in progress for review using the latest rules.

CancelUndo

- Click **Undo** to continue with the undoing of the past import.

NOTE: If the Undo fails, an error message displays:



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

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

CY24 June bid	1/18/24	Debby Golonka	1/18/24	Debby Golonka	CY24 initial bid.zip

New Import

- Click **New Import**, select **Plan Json**, and click **Next** to import another PBP plan or group of plans:

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

- Click **Select File...** to locate the ZIP file containing the PBP JSON files from HPMS.

PBP Import

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


Back

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

PBP Import

New Import

Select a file to import. It must be a .zip file made up of PBP tool end exports.

 PBPXMLData_H5508004000 - HMO.zip

Review the PBPs found in the selected file and select those you would like to keep.

<input checked="" type="checkbox"/>	File Name	Plan Type	Plan ID	Contract Number	Contract Period	Status
<input checked="" type="checkbox"/>	PBPXMLData_H5508003000 - HMO.xml	HMO	003	H5508	2019	Month-over-month Replacement: Replaces a version of this Plan for the same year
<input checked="" type="checkbox"/>	PBPXMLData_H5508004000 - HMO.xml	HMO	004	H5508	2019	New: Plan not yet imported

[Begin Import](#)


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

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

PBP Import

New Import

Select a file to import. It must be a .zip file made up of PBP tool end exports.

 PBP - Copy (2).zip

Review the PBPs found in the selected file and select those you would like to keep.

<input checked="" type="checkbox"/>	File Name	Plan Type	Plan ID	Contract Number	Contract Period	Status
<input type="checkbox"/>	PBPXMLData - PPO.xml	Local PPO	001		2019	Duplicate: This file pertains to the same plan as this other file: PBPXMLData_H9999001000 - PPO_newYear.xml
<input type="checkbox"/>	PBPXMLData - PPO - Copy.xml	Local PPO			2020	Missing Field: This file is missing the following field: "Header: SECTION A: SECTION A-1, Field: PBP_A_CONTRACT_NUMBER"
<input checked="" type="checkbox"/>	PBPXMLData - HMO.xml	HMO	001		2020	New: Plan not yet imported
<input checked="" type="checkbox"/>	PBPXMLData - HMO - Copy.xml	HMO	009		2020	New: Plan not yet imported
<input type="checkbox"/>	PBPXMLData - PPO.xml	Local PPO	009		2021	Missing Field: This file is missing the following field: "Header: SECTION A: SECTION A-1, Field: PBP_A_CONTRACT_NUMBER"
<input type="checkbox"/>	PBPXMLData - PPO_newYear.xml	Local PPO	001		2020	Duplicate: This file pertains to the same plan as this other file: PBPXMLData_H9999001000 - PPO.xml

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

csPBP PBP Import

New Import
(Import one or more Plan Json file in ZIP format)

Review the PBP and/or Companion items found in the selected file and select those you would like to keep.

One or more files are "Year-over-year" replacements. If imported, the old plan year will "freeze" and only imports from this plan year or later will be allowed.

File Name	Type	Plan ID	Contract Number	Segment ID	Contract Period	Status
PBPXMLData_H1818002000_2021.xml	HMO	002	H1818	0	2021	Year-over-year Replacement: Replaces data for this Plan for a prior year

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

Please name this import

Name

Cancel Save

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

PBP Import

3 Items Require Review. ✓ Complete Import

Contract Number	Plan ID	Segment ID	Current Year	Status	Actions
S1234	001	1	2024	In-Progress	Review Fields
S1234	002	1	2024	In-Progress	Review Fields
S1234	005	1	2024	In-Progress	Review Fields

Items per page: 10 1 - 3 of 3 < >

Make changes to your Import below, saving progress if desired. When finished, complete the edit to prevent any further edits.

S1234 \ 001 \ 1 \ 2024 Save Progress ✓ Complete Edit

Select Media Type Variant: None (Default) ANOC EDC SR

☒ All ☐ Changed ☐ Passed Through ☐ Transformed ☐ Edited

Filter Fields

Header	Field Description	Field Name	Previous	Incoming (New)
▼				
▼ Plan Characteristics				
▼ Rx > Rx Setup				
▼ Rx > Rx Setup > Rx Cost Share				
▼ Rx > Rx Setup > Rx Insulin				

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

Complete All Imports?

There are 1 unreviewed items. Are you sure you wish to complete this import?

Cancel Complete All

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

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

PBP Import

3 Items Require Review. Complete Import

Contract Number	Plan ID	Segment ID	Current Year	Status	Actions
S1234	001	1	2024	In-Progress	Review Fields
S1234	002	1	2024	In-Progress	Review Fields
S1234	005	1	2024	In-Progress	Review Fields

Items per page: 10 1 - 3 of 3

Make changes to your Import below, saving progress if desired. When finished, complete the edit to prevent any further edits.

S1234 \ 001 \ 1 \ 2024 Save Progress Complete Edit

☒ All
 ☐ Changed
 ☐ Passed Through
 ☐ Transformed
 ☐ Edited


Filter Fields

Header	Field Description	Field Name	Previous	Incoming (New)
▼ Plan Characteristics				
▼ Rx > Rx Setup				
▼ Rx > Rx Setup > Rx Cost Share				
▼ Rx > Rx Setup > Rx Insulin				

NOTE: You can use **Filter Fields** to filter for Data Grid Fields or Bid fields or filter on Headers, Field Descriptions or Names. See *Filter Fields*.

8. Select a specific **Media Type Variant** to import only those fields that have a Media Type Variant rule transformation set up. The default is Global (all media type variants.)

NOTE: If there are no media type variant rule transformations set up for this plan, this choice does not display.













9. Select the appropriate checkbox to see how the field values are generated:
- **All**—shows all data
 - **Changed**—shows only changed data
 - **Passed through**—shows PBP JSON data (Bid Fields) imported directly without editing. This is the default behavior if there are no rules associated with the field. Many passed through fields may not be part of the final export. You can decide which fields are chosen for export or omitted during the Export process. See *Data Grid Export*.
 - **Transformed**—shows Data Grid Fields transformed by rules during the import process. Clicking the eyeball icon  at end of the line displays which rule is applied.

Applied Rules

Global

Conditional Rule Transformations

Rule ID	Rule Condition	Rule Value	Applied?
1	(PBP: SECTION B: #71 PT AND SP SERVICES - BASE 1 / ...	"\$0 copay"	-
2	(PBP: SECTION B: #71 PT AND SP SERVICES - BASE 1 / ...	DropZeroDecimal(PBP: SECTION B: #71 PT AND SP SER...	-
3	(PBP: SECTION B: #71 PT AND SP SERVICES - BASE 1 / ...	DropZeroDecimal(PBP: SECTION B: #71 PT AND SP SER...	-
4	(PBP: SECTION B: #71 PT AND SP SERVICES - BASE 1 / ...	"\$" + DropZeroDecimal(PBP: SECTION B: #71 PT AND SP ...	Applied
5	(PBP: SECTION B: #71 PT AND SP SERVICES - BASE 1 / ...	"\$" + DropZeroDecimal(PBP: SECTION B: #71 PT AND SP ...	-
6	(always runs when reached)	**	-


	No prior authorization required.	
	No referral required.	
	\$30 copay	
	Prior authorization is required.	
	No referral required.	
	Not covered	

- **Edited**—shows rows edited manually in the module before or during import.

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

Header	Field Description	Field Name	Previous	Incoming (New)
▼ SECTION RX: TIER #1 - MAIL ORDER COPAYMENT AND COINSURANCE - PRE-ICL				
▼ SECTION RX: TIER #1 - OON AND LTC COPAYMENT AND COINSURANCE - PRE-ICL				
▲ SECTION RX: TIER #1 - RETAIL PHARMACY COPAYMENT AND COINSURANCE - PRE-ICL				
SECTION RX: TIER #1 - RETAIL PHAR...	Retail 30-day tier 1	Ret_30_Rx_1		50 copay
SECTION RX: TIER #1 - RETAIL PHAR...	Retail 60-day tier 1	Ret_60_Rx_1		50 copay
SECTION RX: TIER #1 - RETAIL PHAR...	Retail 90-day tier 1	Ret_90_Rx_1		50 copay
▲ Custom				
Custom		telehealth_test		Not covered
▲ SECTION C: OON - GENERAL - BASE 1				
SECTION C: OON - GENERAL - BASE 1	ASP - OON/IMP cost	ASP_OON	Not covered	

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

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

Edit IPHP_PA (SECTION B: #1B INPATIENT HOSPITAL PSYCHIATRIC - BASE 12)

Field Value

Authorization Rules may apply. (1)

Confirm

Cancel

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

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

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

Field Value

38010 - Benton, OR +

Field Value

38040 - Columbia, OR x +

Field Value

38050 - Coos, OR x +

Field Value

38060 - Crook, OR x +

Field Value

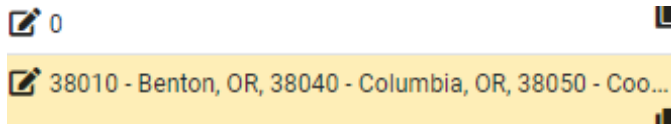
38070 - Curry, OR x +

Field Value

38080 - Deschutes, OR x +

Confirm Cancel

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



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

The system is processing your import. It will appear in the Completed Imports section once complete.

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

csPBP

PBP Import

Data Grid Export

Rules Grid Export

Manage PBPs

Comparison Report

Admin

Data Schema

Field Archive

Data Grid Fields

Rules Grid Fields

Crosswalks

Rule Extensions

Manage PBPs

Select plans to re-process the latest imported values under the latest rules, or click the grid icon to view the current data for that plan.

Selected Plans:

☐ Select all on screen regardless Plan Type

Actions

Contract Number

Plan ID

Segment ID

Year

Updated On

Updated By

Created On

Created By

Import Type

Filter

Filter

Filter

Filter

Filter

Filter

Filter

Filter Plan Types

☐ All visible Plans of type HMO - MAPD / HMO - MA / HMO - DSNP / HMO - CSNP / HMO - ISNP

☐

H1234

001

0

2023

1/16/24

Nick Scalfone

1/16/24

Debby Golonka

Plan/Json

☐

H5221

004

0

2024

12/4/23

Nick Scalfone

12/4/23

Nick Scalfone

Plan/Json

☐

H7871

001

0

2024

12/4/23

Nick Scalfone

12/4/23

Nick Scalfone

Plan/Json

☐

H3049

003

0

2024

12/4/23

Nick Scalfone

12/4/23

Nick Scalfone

Plan/Json

☐

H3049

004

0

2024

12/4/23

Nick Scalfone

12/4/23

Nick Scalfone

Plan/Json

☐

H4183

007

0

2024

12/4/23

Nick Scalfone

12/4/23

Nick Scalfone

Plan/Json

☐ All visible Plans of type HMOPOS - MA / HMOPOS - MAPD

H1234

002

0

2023

1/16/24

Nick Scalfone

1/16/24

Debby Golonka

Plan/Json

☐

H2330

004

0

2024

12/4/23

Nick Scalfone

12/4/23

Nick Scalfone

Plan/Json

</

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

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

Manage PBPs

Back to List

Which versions should be included?

Limit Date Range and # of Versions

Show Imports After Date

of Versions to Display

Latest Version by Year

Filter Plans

Filter Fields

Header	Field Description	Field Name	2024 v1 (Jan)
⌵			
	<div><div></div>Contract ID</div>	<div><div></div>contractid</div>	<div><div></div>S1234</div>
	<div><div></div>Contract Year</div>	<div><div></div>contractYear</div>	<div><div></div>2024</div>
	<div><div></div>Plan Id</div>	<div><div></div>planid</div>	<div><div></div>001</div>
	<div><div></div>The unique identifier for the segment within the plan within the organization (Contract Number...</div>	<div><div></div>segmentid</div>	<div><div></div>1</div>
⌵ Plan Characteristics			
Plan Characteristics	<div><div></div>The Chronic or Disabling SNP conditions for your plan will appear in this field. The SNP Condi...</div>	<div><div></div>chronicOrDisablingConditions</div>	<div><div></div>Not Available</div>
Plan Characteristics	<div><div></div></div>	<div><div></div>contractsOfferPartD</div>	<div><div></div>Yes</div>
Plan Characteristics	<div><div></div>Contract Legal Name</div>	<div><div></div>contractLegalName</div>	<div><div></div>Test Contract Name</div>
Plan Characteristics	<div><div></div>The Plan Geographic Name field is read-only and will be pre-populated with the information e...</div>	<div><div></div>geographicName</div>	<div><div></div>State</div>
Plan Characteristics	<div><div></div>The Plan Type field is read-only and will be pre-populated with the information entered during ...</div>	<div><div></div>hmoPlanType</div>	<div><div></div>Medicare Prescription Drug Plan</div>

Replace Plan

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

PBP Import

New Import
Select a file to import. It must be a .zip file made up of PBP tool xml exports.

☒ PBPMMLData_H5508004000 - HMO.zip

Review the PBPs found in the selected file and select those you would like to keep.

<input checked="" type="checkbox"/>	File Name	Plan Type	Plan ID	Contract Number	Contract Period	Status
<input checked="" type="checkbox"/>	PBPMMLData_H5508003000 - HMO.xml	HMO	003	H5508	2019	Month over month Replacement: Replaces a version of this Plan for the same year

[Begin Import](#)

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

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

PBP Import

File Name	Contract Number	Plan ID	Current Year	Status	Actions
PBPMMLData_H5508003000 - HMO.xml	H5508	003	2019	Unsaved	Review Fields

Items per page: 10 1 - 1 of 1

☒ All
 ☐ Changed
 ☐ Passed Through
 ☐ Transformed
 ☐ Edited

[Edit Complete](#)

SECTION A: SECTION A-1

SECTION A: SECTION A-2

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

- **Red** indicates a field was in the original but is now missing or deleted in the new replacement.
 - **Green** is a new field in the new replacement plan that was not in the original.
 - **Yellow** indicates a change. This change might be the result of several different actions:
 - The value changed from the original value to the value in the new replaced plan. The original value in PBP Bid report may have changed.
 - The transformed value is different from the previously transformed value. A JSON script or rule may have changed.
 - Unchanged rows have no color coding.
3. Complete the replacement by finishing the Add Item steps of editing values, adding rows, etc.
 4. Click **Save**

Data Grid Export

The Data Grid Export screens allow you to output transformed data to a variety of formats.

There are three main components of the screen:

- Plan Selection
- Benefit Selection
- Export

1. Select **Data Grid Export**. The Data Grid Export page displays:

2. If you have In-Progress Imports that include plans that will be part of your Data Grid Export, you must complete them for the latest rule changes to apply to the exported plans. Click **Reprocess Plans**. See *Reprocess Selected Plans*.

Plan Selection

1. Populate the Plan Selection area of the screen. There are two options:
 - Apply a saved export
 - Check the boxes for the versions and plans you want to include in your export file

Apply a Saved Export—You can start by selecting a previously saved selection of versions and plans (Saved Export) and automatically complete the Plan Selection component and the Benefit Selection component of your Data Grid Export.

- a. Select a previously saved selection from the Saved Exports dropdown list.
- b. Click **Apply Saved Export**.

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

NOTE: In this area of the screen, you can also delete any saved export by selecting it from the dropdown list and clicking **Delete Saved Export**.

Select Versions, Plans, and Column Order — If you do not have a saved export or do not choose to use a saved export:

- a. Select which version option you want to use for export. You can select a single year or multi-year format. In-Progress imports are not included.
 - **Just the Latest Version** will export the latest completed imported version, no matter if it's current contract year or next contract year.
 - **Also Include Previous Versions (Cannot Publish to CM)** will export the latest imported versions and the versions that preceded them. This choice operates within the current contract year you are working on, for example exporting side-by-side versions of the June initial loading of the data and the August rebid and reallocation version. It does not include versions from previous years.

NOTE: If you select "Also Include the Previous Version" you cannot select "Publish to CM as an Asset" as the Export type later in the Export process because the Asset must be associated with a single year. To export a file to the CodySoft® Collateral Management (CM) module, select any of the other version options.

- i. Enter a **Show Imports After Date** to see all versions created after that date
 - ii. Select a **# of Versions to Display** value from the dropdown list to limit the number of versions to display
- **Latest Versions for each Year** will export the latest final imported version from prior contract years you specify, for example, exporting side-by-side versions of 2019 and 2020 data that can be used for comparison when working on an ANOC.
 - i. Enter a value for the # of Years to Display. You can display multiple years of data for comparison.
- **Specific Year** will export the latest completed import version from the contract year you specify.
- **Latest Versions for TY/NY** will export the latest completed import version from This Year (TY) and the latest completed import version from Next Year (NY). These are terms taken from the CMS Annual Notice of Changes (ANOC) model document.
 - TY = this current plan contract year
 - NY = next plan contract year

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

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

Selected Individual Plans:

Contract Number	Plan ID	Segment ID	Current Year	Updated On ↓	Updated By	Created On	Created By
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter

Filter Plan Types

- MAPD - HMO / MA - HMO
- MAPD - HMO-POS
- MAPD - PPO / PPO - IOP

Click any of these columns to refine and narrow your search results for export:

Contract Number, Plan ID, Segment ID, Year, Updated By, or Created By.

3. In the display of the **Selected Individual Plans**, you can drag and drop plans to change the left to right order, which controls the order they appear in the export:

Data Grid Export

Plan Selection

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

Selected Individual Plans: H1000 (100) H6750 (013) H6750-1 (012) H6750-2 (012) H6750 (005)

☐ Select all on screen regardless of Plan Type

Contract Number	Plan ID	Segment ID	Year	Updated On ↓	Updated By	Created On	Created By
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter

Filter Plan Types

☐ All visible Plans of type HMO - CSNP / HMO - DSNP / HMO - MAPD

<input checked="" type="checkbox"/>	H1000	100	0	2024	1/2/24	Nick Scalfone	11/16/23	Nick Scalfone
<input type="checkbox"/>	H2962	001	0	2024	1/2/24	Debby Golonka	12/4/23	Nick Scalfone
<input checked="" type="checkbox"/>	H6750	005	0	2024	11/17/23	Nick Scalfone	11/16/23	Nick Scalfone
<input checked="" type="checkbox"/>	H6750	013	0	2024	11/17/23	Nick Scalfone	11/16/23	Nick Scalfone
<input checked="" type="checkbox"/>	H6750	012	1	2024	11/17/23	Nick Scalfone	11/16/23	Nick Scalfone
<input checked="" type="checkbox"/>	H6750	012	2	2024	11/17/23	Nick Scalfone	11/16/23	Nick Scalfone

4. Click **Confirm Plans**. The Benefit Selection screen for selecting fields for export displays.

Data Grid Export

Plan Selection

Benefit Selection

Current Selections

Filter Fields

All panels must be collapsed before re-ordering headers.

Close All Section Panels

Fields Available for Export:

Add Fields Add All Fields

Exported Fields:

Remove Fields Remove All Fields

☐
☐ Plan Characteristics
☐ Standard Bid
☐ Benefit Offerings > MC > medicareBenefitOfferingDetails > 1a: Inpatient Hospital-Acute
☐ Benefit Offerings > MC > medicareBenefitOfferingDetails > 1b: Inpatient Hospital Psychiatric
☐ Benefit Offerings > MC > medicareBenefitOfferingDetails > 2: Skilled Nursing Facility (SNF)
☐ Benefit Offerings > MC > medicareBenefitOfferingDetails > 3-1: Cardiac Rehabilitation Services

Benefit Selection

On the left side of the page, click the dropdown arrow next to any Header name to see the fields available for selection:

- On the left side of the page, click the dropdown arrow next to any Header name to see the fields available for selection:

Fields Available for Export:

Add Fields Add All Fields

☐ Section A
 CSNPconditions
 MAO
 Plan_ID
 Plan_Type
 State
 Plan_Name
 Segment000
 Segment
 Continuation_area

☐ 1a Inpatient Hospital Acute - BP
☐ 1a Inpatient Hospital Acute - LRD

2. Select the checkboxes for the fields you want to export from each header, and click **Add Fields**. The selected fields are now displayed on the right side of the page:

You can also click **Add All Fields** to move all fields to the Exported Fields selection on the right side of the page.

The screenshot displays a user interface for selecting fields to export. It is divided into two main panels: 'Fields Available for Export' on the left and 'Exported Fields' on the right.

Fields Available for Export: This panel contains a list of fields, each with a checkbox and a dropdown arrow. The fields are organized into sections, with the first section being '1a Inpatient Hospital Acute'. The fields listed are:



- 1a Inpatient Hospital Acute - BP
- 1a Inpatient Hospital Acute - LRD
- 1a Inpatient Hospital Acute - LRD - OON
- 1a Inpatient Hospital Acute - MC - OON
- 1a Inpatient Hospital Acute - non-MC - PA/REF
- 1a Inpatient Hospital Acute - non-MC Addl Days
- 1a Inpatient Hospital Acute - non-MC Addl Days - OON
- 1a Inpatient Hospital Acute - non-MC Stay
- 1a Inpatient Hospital Acute - non-MC Stay - OON
- 1a Inpatient Hospital Acute - non-MC Upgrades
- 1a Inpatient Hospital Acute - non-MC Upgrades - OON
- 1a Inpatient Hospital Acute - Notes
- 1a Inpatient Hospital Acute - PA/REF
- 1a Inpatient Hospital Acute - SS
- 1b Inpatient Hospital Psychiatric - BP
- 1b Inpatient Hospital Psychiatric - LRD

Exported Fields: This panel shows the fields that have been selected for export. It is organized into sections. The first section is 'Section A', which contains the following fields:

- CSNPconditions
- MAO
- Plan_ID
- Plan_Type
- State
- Plan_Name
- Segment000
- Segment
- Continuation_area

Below 'Section A', there are three more sections, each with a checkbox and a dropdown arrow:

- 1a Inpatient Hospital Acute - MC
- 1b Inpatient Hospital Psychiatric - MC
- 2 Skilled Nursing Facility (SNF) - MC
- 3 Cardiac & Pulmonary Rehab Svcs - MC Cardiac

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

Save Benefit Selection

Name

|

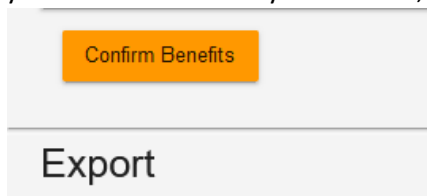
Please provide a name for this saved list of benefits

Cancel

Confirm

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

8. When you are satisfied with your choices, click **Confirm Benefits**.



The Export screen displays:

 A screenshot of a form titled "Export". Below the title, there are two sections. The first section is "What kind of Export is this?" with five radio button options: "PBP Report", "Data Grid" (which is selected), "Mass Update", "Supplement Data Report", and "Publish to CM as an Asset". The second section is "What file format would you like?" with two radio button options: "PDF" and "Excel" (which is selected). At the bottom of the form, there are two buttons: an orange "Export" button and a gray "Save Export" button.

NOTE: If you selected “Also Include the Previous Version,” the choice for “Publish to CM as an Asset” will be greyed out, because a CodySoft® Collateral Management (CM) Asset must be associated with a year.

Export

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

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

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

Publish to CM as an Asset

What should the Asset be called?

PharmacyDataGrid

Note: Entering the name of an existing asset will result in that asset being replaced with a draft version.

Export

2. Select a **file format**: PDF or Excel
3. **NOTE:** If your plans have media type variances, an additional checkbox displays:

Plan Selection

Benefit Selection

Export

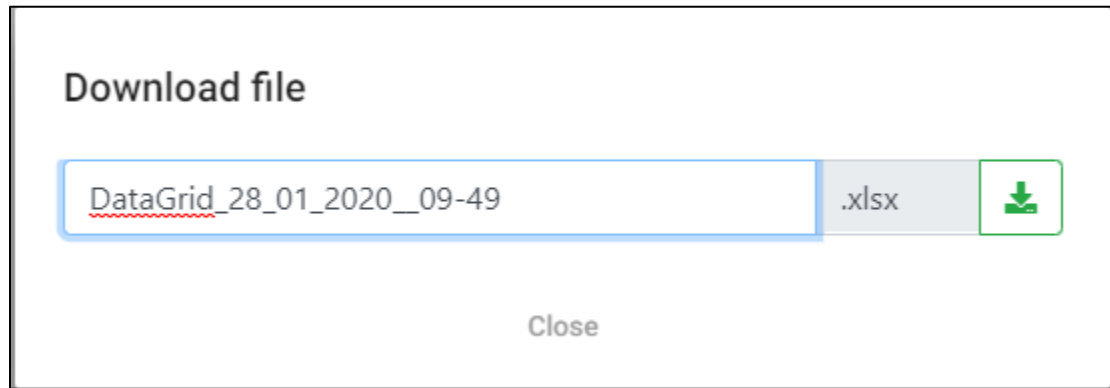
Which Media Type Variant will this Export use?

☐ Include Values for all Media Type Variants

Variant Name

- a. Select the checkbox to include values for all Media Type Variants. All variances output in the exported grid with the media type appended with a suffix, as in this example:
 - IPHA_IN
 - IPHA_IN_EOC
 - IPHA_IN_ANOC
- b. If you leave the checkbox unselected, then you must select a variant from the Variant Name dropdown. The fields in the resultant grid have the same names as the data grid field names, for example IPHA_IN.


4. Click **Export**. The Download file dialog box displays:



5. Name your export file. The date and time are added to the default filename automatically; you don't have to keep those values in your filename.

NOTE: You can use spaces and dashes (-) in the filename. No other special characters are allowed.



6. Click the green download button . The plan benefit data for the Plan IDs you selected is output in the format you chose. As with any download, you can open the file immediately or save it.


NOTE: All cells in the exported Excel file default to "Text" cell format to remain compatible with CodySoft® Collateral Management import.

7. Click **Close** to remove the Download file dialogue box.

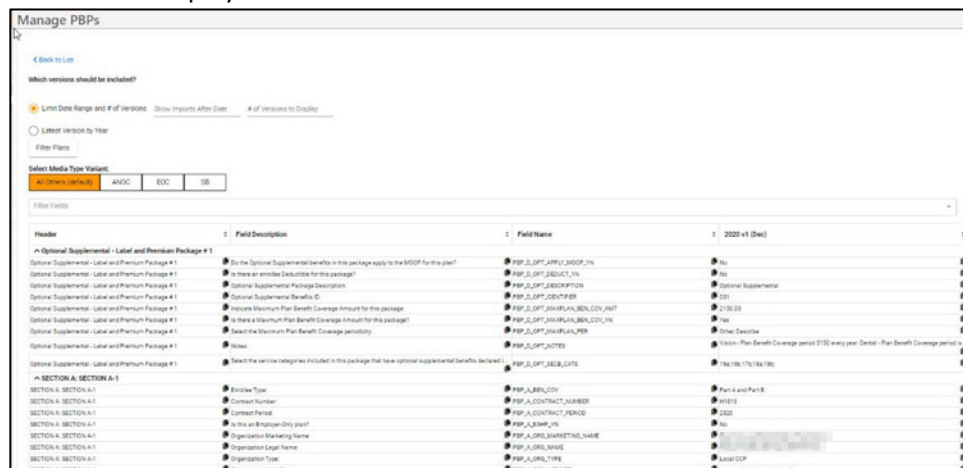
Manage PBPs

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

View Plan Benefits

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

The list of benefits displays:



Header	Field Description	Field Name	2020 v1 (Doc)
Optional Supplemental - Label and Premium Package # 1	Is the Optional Supplemental benefits in this package apply to the MOP for this plan?	PBP_LUPT_APU_MOP_VN	No
Optional Supplemental - Label and Premium Package # 1	Is there an annual Deductible for this package?	PBP_LUPT_APU_DUCT_VN	No
Optional Supplemental - Label and Premium Package # 1	Optional Supplemental Package Description	PBP_LUPT_DESCRIPTION	Optional Supplemental
Optional Supplemental - Label and Premium Package # 1	Optional Supplemental Benefits ID	PBP_LUPT_BENFID	221
Optional Supplemental - Label and Premium Package # 1	Is there a Maximum Plan Benefit Coverage Amount for this package?	PBP_LUPT_MAXPLAN_BEN_COV_AMT	1718.00
Optional Supplemental - Label and Premium Package # 1	Is there a Maximum Plan Benefit Coverage period for this package?	PBP_LUPT_MAXPLAN_BEN_COV_VN	Yes
Optional Supplemental - Label and Premium Package # 1	Select the Maximum Plan Benefit Coverage period	PBP_LUPT_MAXPLAN_PER	Other Describe
Optional Supplemental - Label and Premium Package # 1	Notes	PBP_LUPT_NOTES	1718 - Plan Benefit Coverage period 1718 every year. Dental - Plan Benefit Coverage period
Optional Supplemental - Label and Premium Package # 1	Select the service categories included in this package that have optional supplemental benefits declared	PBP_LUPT_SERV_CAT	164186, 1718, 184186
SECTION A: SECTION A-1	Benefit Type	PBP_LUPT_BENFID	Plan A and Plan B
SECTION A: SECTION A-1	Contract Number	PBP_LUPT_CONTRACT_NUMBER	161818
SECTION A: SECTION A-1	Contract Period	PBP_LUPT_CONTRACT_PERIOD	2023
SECTION A: SECTION A-1	Is this an Employee Only plan?	PBP_LUPT_EMP_VN	No
SECTION A: SECTION A-1	Organization Branding Name	PBP_LUPT_BRANDING_NAME	171
SECTION A: SECTION A-1	Organization Legal Name	PBP_LUPT_ORG_NAME	Land COP
SECTION A: SECTION A-1	Organization Type	PBP_LUPT_ORG_TYPE	Land COP
SECTION A: SECTION A-1	Organization Year Day	PBP_LUPT_ORG_YEARDAY	1718-01-01


2. Optionally, select a specific **Media Type Variant** to view changes to benefits that have a Media Type Variant rule transformation set up. The default is "Global (default)" (all media type variants.) If you set up at least one other variant, the orange "Global (default)" indicator switches to "All Others (default)" and if all variants are deleted it switches back to "Global(default)".

NOTE: If there are no media type variant rule transformations set up for the plan, this choice does not display.

NOTE: If you change the Media Type Variant selection, a message displays while the change is being processed:




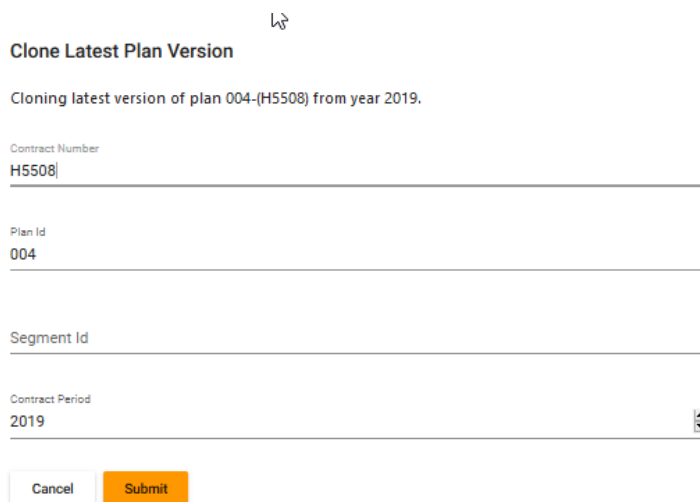
3. Use the Filters to select plan history by date range and number of versions or by year
 - a. Select **Limit Date Range and # of Versions** to filter by those parameters
 - i. Enter a **Show Imports After Date** to see all versions created after that date
 - ii. Enter a **# of Versions to Display**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

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

Clone Plan

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

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



Clone Latest Plan Version

Cloning latest version of plan 004-(H5508) from year 2019.

Contract Number
H5508

Plan Id
004

Segment Id

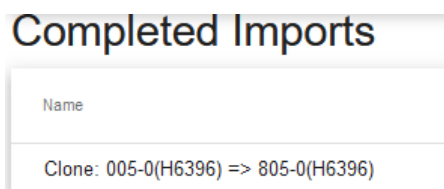
Contract Period
2019

Cancel Submit

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

NOTE: You must change at least one of the values on the Clone Latest Plan Version screen. You cannot clone a plan to itself. Also, if the plan is using an older version of the data structure you may need to re-import the file again with a new data schema. See *Upload a new PBP schema* or *Upload a new Companion schema*.

2. Click **Submit**.
3. Follow the process for a new import to review the fields, complete the edit, and complete the import of the plan. See *New Import*. When complete, the new plan displays in the Completed Imports in PBP Import, with the Name field clearly identifying the plan as a clone and the plan from which the new plan was cloned:



Completed Imports
Name
Clone: 005-0(H6396) => 805-0(H6396)

Reprocess Selected Plans

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

Manage PBPs

Select plans to re-process the latest rules and display the most current value transformations or Click the grid icon to view the last data processed for that plan.

Selected Plans: Compare Plans Reprocess Selected Plans

☐ Select all on screen regardless of Plan Type

Actions	Contract Number	Plan ID	Segment ID	Year	Updated On ↓	Updated By	Created On	Created By	Import Type
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	

Filter Plan Types

☐ All visible Plans of type HMO - MAPD / HMO - MA / HMO - DSNP / HMO - CSNP / HMO - ISNP

<input type="checkbox"/>			H1234	001	0	2023	1/16/24	1/16/24	Debby Golonka	PlanJson
<input type="checkbox"/>			H5221	004	0	2024	12/4/23	12/4/23	Nick Scalfone	PlanJson
<input type="checkbox"/>			H7871	001	0	2024	12/4/23	12/4/23	Nick Scalfone	PlanJson
<input type="checkbox"/>			H3049	003	0	2024	12/4/23	12/4/23	Nick Scalfone	PlanJson
<input type="checkbox"/>			H3049	004	0	2024	12/4/23	12/4/23	Nick Scalfone	PlanJson
<input type="checkbox"/>			H4183	007	0	2024	12/4/23	12/4/23	Nick Scalfone	PlanJson

☐ All visible Plans of type HMOPOS - MA / HMOPOS - MAPD

<input type="checkbox"/>			H1234	002	0	2023	1/16/24	1/16/24	Debby Golonka	PlanJson
<input type="checkbox"/>			H2330	004	0	2024	12/4/23	12/4/23	Nick Scalfone	PlanJson

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

Admin

Data Schema

Data Schema

Global JSON PBP Schema

Upload Global JSON PBP Schema

Title	Created By	Created On	Updated By	Updated On	
pbp-api-download-schema-v6.1.json	Randi Ranaweera	4/21/23	Randi Ranaweera	4/21/23	Remove

PBP Schemas

Upload a PBP Schema

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

MDB Schemas

Upload a PBPDICTIONARY .mdb file

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

Companion Data Schemas

Upload a Companion Schema

Table Name	File Name	Created By	Created On	Updated By	Updated On	
-- No Items Found --						

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

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

Upload a new PBP schema


To add a new PBP schema:

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

Upload Schema

PBPCompanion DataPBPDICTIONARYGlobal JSON PBP

Select the json schema file for the desired year.

 pbp-api-download-schema-v6.1.json

CancelSave

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

Data Schema

Global JSON PBP Schema

Upload Global JSON PBP Schema

Title	Created By	Created On	Updated By	Updated On	
pbp-api-download-schema-v6.1.json	Randi Ranaweera	4/21/23	Randi Ranaweera	4/21/23	Remove

Upload a new PBDICT .MBD file

To add a new PBDICT .mbd file:

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

Upload Schema

PBP Companion Data PBDICT.mdb

Select the Access Database (.mdb, starting with "PBDICT") file for the desired year.

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

MDB Schemas

Upload a PBDICT .mdb file

Title	CMS Plan Types	Created By	Created On	Updated By	Updated On	
PBDICT2022.mdb	HMO, HMOPOS, LPPO, PSO State License, MSA, RFB PFFS, PFFS, MMP HMO, MMP HMOPOS, 1876 Cost, 1833 Cost, PACE, PDP, RPPO, Fallback, ED PDP, ED PFFS, RFB HMO, RFB HMOPOS, RFB LPPO, RFB PSO State License, ED LPPO	Stephen Billias	3/4/21	Stephen Billias	3/4/21	Remove

Edit a PBP schema

To edit a PBP schema:

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

Plan Types for HMOPOS

Please select the plan types/subtypes to use when a file denoted "HMOPOS" is uploaded.

Covered Plan Types

MAPD - HMO, MAPD - HMO-POS, MA - HMO

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

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

Remove a schema

To remove a PBP or Companion Data schema:

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

Remove Row

Are you sure you want to remove this row?

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

Upload a new Companion schema

To add a new Companion Data schema:

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

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

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

- c. **Plan Identifier Field**—From the dropdown list, select the field that identifies that plan's identifier
 - d. **Segment Identifier Field**—From the dropdown list, select the field that identifies that plan's segment
 - e. **Contract Period Field**— From the dropdown list, select the field that identifies the plan's contract period (usually the contract year, for example, CY2024)
6. Click **Save**. The companion data file is added to the list of Companion Data schemas.

NOTE: You may have to edit your companion data file in advance to make sure that you have the correct fields to map to the required fields for the schema.

NOTE: A message displays while a schema is being uploaded:

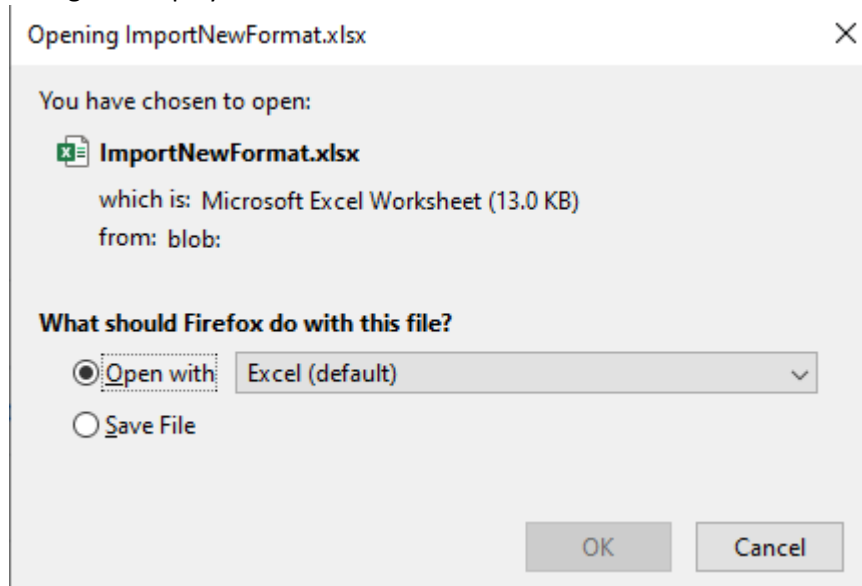
Schema upload is being processed. You will be notified as soon as it is finished. You may continue with your work in the meantime.

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

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

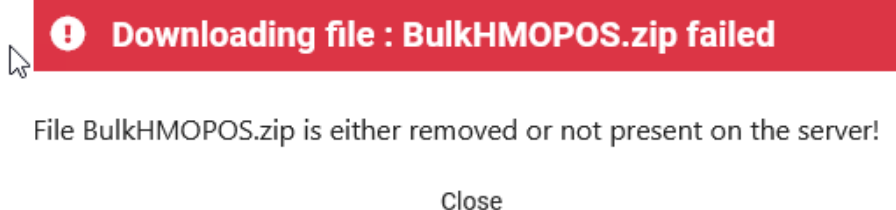
You can download a PBP schema, PBPDICTION .mbd file, or Companion schema.

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



2. Open the file in Excel or Save it.

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



Field Archive

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

To archive unused field(s):

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

The screenshot shows the 'Field Archive' interface. At the top, there's a 'Select Fields' dropdown menu. Below it, the 'Review and Archive Fields' section contains a table with columns: Header, Name, Description, and Source. The table lists two fields for archiving:

Header	Name	Description	Source
Benefit Details > MC > 2: Skilled Nursing Facility (SNF) > TierCopaymentComponent	bdCopaymentTier3YesNo	Do you charge the Medicare-defined cost share for tier 3?	Unarchive
Benefit Details > MC > 3-1: Cardiac Rehabilitation Services > CopaymentComponent	bdCopaymentAmount	Copayment amount	Unarchive

At the bottom right, there are pagination controls: 'Items per page: 25' and '1 - 2 of 2'.

2. Click in the **Select Fields** box to find specific fields you want to archive. A list of searched fields is displayed:

The screenshot shows the 'Field Archive' interface with the 'Select Fields' section expanded. It features an 'Advanced Search' box with the following filters:

- Header Name: MC > 16
- Field Name: dental
- Field Type?: ☒ All ☐ Data Grid Fields ☒ Bid Fields

Below the search box, a list of fields is displayed, each with a checkbox and a dropdown arrow:

- ☐ bdMaxPlanComprehensiveDentalRadioOpts Benefit Details > MC > 16b: Comprehensive Dental > MaxPlanCoverageComprehensiveDentalComponent
- ☐ bdMaxPlanComprehensiveDentalYesNo Benefit Details > MC > 16b: Comprehensive Dental > MaxPlanCoverageComprehensiveDentalComponent
- ☐ bdDentalCoinsurancePerYesNoMinMax Benefit Details > non-MC > 16a: Preventive Dental > DentalCoinsuranceComponent
- ☐ dentalXrays Benefit Details > non-MC > 16a: Preventive Dental > DentalCoinsuranceComponent > bdDentalCoinsuranceServicesOptions
- ☐ bdDentalCopaymentAmount Benefit Details > non-MC > 16a: Preventive Dental > DentalCopaymentComponent

3. Use **Advanced Search** to further refine your search criteria. Filter by these choices:
 - **Header Name**
 - **Field Name**
 - **Description**
 - **Field Type?** — Select Bid Fields to search field names taken directly from the imported CMS Bid file.

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

Field Archive

Archive Fields

Select Fields

x bdCopaymentAmountYesNo x bdCopaymentAmt x bdCopaymentCostShareYesNo x bdCopaymentTier1Amt x bdCopaymentTier1YesNo x bdCopaymentTier2Amt x bdCopaymentTier2YesNo x bdCopaymentTier3Amt
 x bdCopaymentTier3YesNo x bdCopaymentAmountYesNo_1 x bdCopaymentCostShareYesNo_1 x bdCopaymentAmount x bdCopaymentAmountYesNoMinMax x bdCopaymentMaxAmount x bdCopaymentMinAmount

Review and Archive Fields

Archive Fields

Header	Name	Description	Source
Benefit Details > MC > 1a: Inpatient Hospital-Acute > CostShareABComponent	bdCopaymentAmountYesNo	Is there a copayment?	
Benefit Details > MC > 1a: Inpatient Hospital-Acute > CostShareABComponent	bdCopaymentAmt	Copayment	
Benefit Details > MC > 1a: Inpatient Hospital-Acute > CostShareABComponent	bdCopaymentCostShareYesNo	Do you charge the Medicare-defined cost share?	
Benefit Details > MC > 1a: Inpatient Hospital-Acute > CostShareABPOSComponent	bdCopaymentAmountYesNo	Is there a copayment?	
Benefit Details > MC > 1a: Inpatient Hospital-Acute > CostShareABPOSComponent	bdCopaymentCostShareYesNo	Do you charge the Medicare-defined cost share?	
Benefit Details > MC > 1a: Inpatient Hospital-Acute > TierCopaymentComponent	bdCopaymentAmountYesNo	Is there a copayment?	
Benefit Details > MC > 1a: Inpatient Hospital-Acute > TierCopaymentComponent	bdCopaymentTier1Amt	Copayment for Medicare-covered stay	
Benefit Details > MC > 1a: Inpatient Hospital-Acute > TierCopaymentComponent	bdCopaymentTier1YesNo	Do you charge the Medicare-defined cost share for tier 1?	

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

To unarchive archived field(s):

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

Field Archive

Archive Fields

Select Fields

Select Fields

Review and Archive Fields

Archive Fields

Header	Name	Description	Source
Benefit Details > MC > 2: Skilled Nursing Facility (SNF) > TierCopaymentComponent	bdCopaymentTier3YesNo	Do you charge the Medicare-defined cost share for tier 3?	Unarchive
Benefit Details > MC > 3-1: Cardiac Rehabilitation Services > CopaymentComponent	bdCopaymentAmount	Copayment amount	Unarchive

Items per page: 25 1 - 2 of 2 < >

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

Data Grid Fields

The Data Grid Fields screen lists all transformation-specific rules that have been created for Data Grid fields. From this screen you can add a new field, edit the rules of a field, remove a field, search for specific fields, globally find and replace text within a rule in either the Condition section or the Value Transformation section, find and replace field headers, and clone fields.

Filter Fields

1. Click in the **Filter Fields** bar to locate a field or fields you want to review, edit, or remove:

For example, if you enter “cardiac” in the Filter Fields bar, the system returns all fields with “cardiac” in the header name or field name:

NOTE: The Filter Fields search is not case sensitive.


2. Click anywhere in a field row to see the details of the field:

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

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



The screenshot shows a 'Filter Fields' dialog box. At the top, there is a search bar and three buttons: 'Clear', 'Select All', and 'Deselect All'. Below this, the 'Advanced Search' section is highlighted. It contains three input fields: 'Header Name:', 'Field Name:', and 'Description:'. The 'Field Name:' field is currently selected.

5. Filter by these choices:
- **Header Name**
 - **Field Name**
 - **Description**
6. When you have narrowed your search, click the edit icon  to edit the existing field. A popup window displays for Edit Transformation. See *Edit Transformation Field*.

New Field

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

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

Create Field

Field Name

Please enter a name consisting of numbers, letters, and underscores. Please avoid names starting with "YBP".

Type a Header Name or choose an Existing one.

☐ Header Name

☐ Header Name (Choose Existing)

2. Enter a new **Field Name**.

NOTE: No spaces or special characters other than underscore (_) are allowed in the field name.

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


6.

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

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

Change Header

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

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

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

4. Click **Save**


Field Description

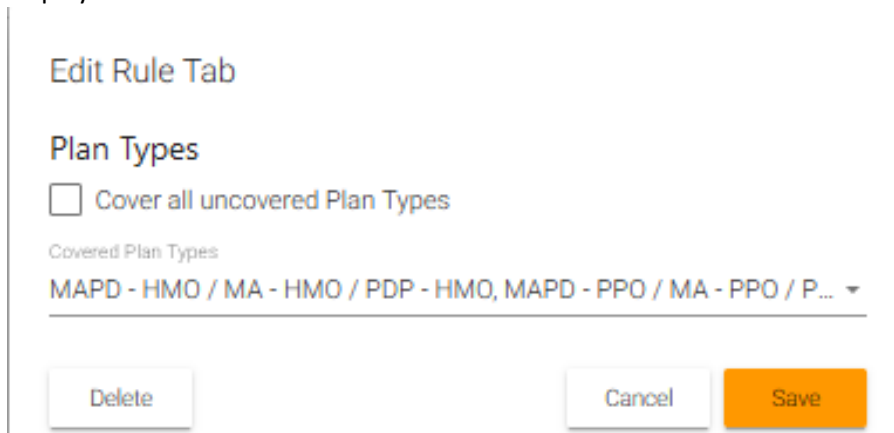
1. Enter a **description** that will be included in the export and can be used to search for fields.
2. Click **Save**

Transformation Rules

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


Edit Plan Types list

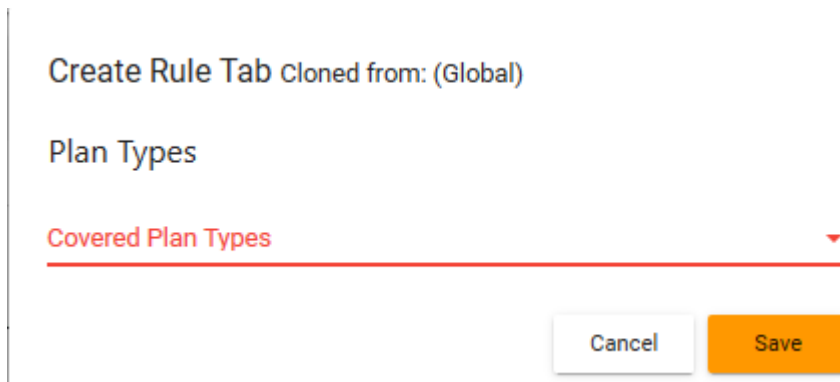
- 1) Click the edit icon  to change the list of plan types. The Edit Rule Tab dialogue displays:



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

Clone Plan Types list

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



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

Add a new plan types list

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

Create Rule Tab

Plan Types

Covered Plan Types

Cancel Save

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

Find & Replace

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

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

Find and Replace within Rules

1 Enter details 2 Preview 3 Results

Text to Replace

Text to Use Instead

Which part of the rule should be searched?

☒ Whole Rule
☐ Condition Only
☐ Value Only

Search Type

☒ Any Match
☐ Whole Word (including letters, numbers, and special characters)

☐ Match Case (Text to Replace would be Case Sensitive)
☐ Only apply to a single Media Type Variant

Preview Changes

Cancel

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

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

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

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

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

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

Add Transformations

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

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

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

- Select a **Condition Type** from the dropdown list.
The available values are:
 - **ALL**—Requires that each of a list of conditions be met
 - **ANY**—Requires at least one condition to be met
- On the left side select whether to enter text to use in the condition, or to use a field from the PBP Bid Report or from a Companion Data Table:

- If “Type in a Value,” enter text value
- If “Use Value Directly from Bid,” select a Bid Field from the dropdown list

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

5. Indicate how the value should be adjusted:


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



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

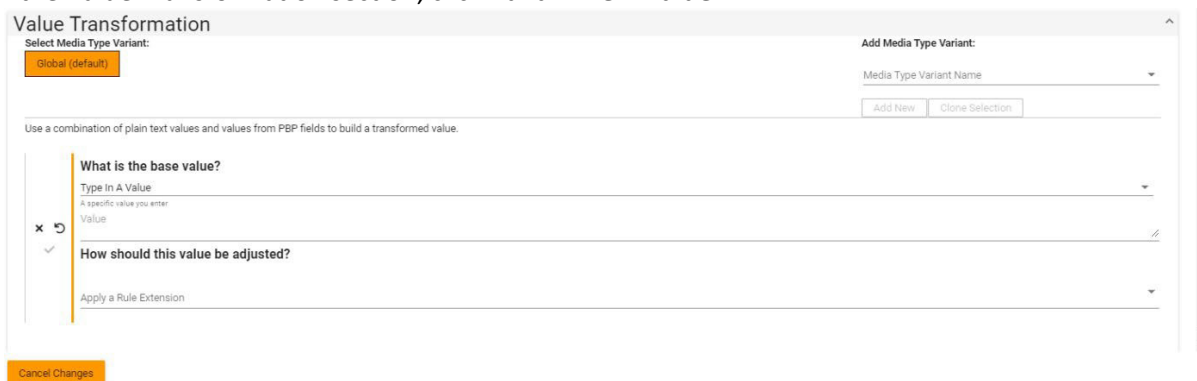
SECTION B: #10B TRANSPORTATION SERVICES - BASE 3

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

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

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

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



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



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

- e. If “Use Value Directly from Bid,” select a Header Name from the dropdownlist

What is the base value?

Use Value Directly from Bid

A field taken from the PBP

Field

bdcoinsuranceamount

Clear

Advanced Search

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

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

☐ **bdCoinsuranceAmount** Benefit Details > MC > 3-2: Intensive Cardiac Rehabilitation Services > CoinsuranceComponent

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

What is the base value?

Use Value Directly from A Companion Table

A field taken from a Companion Table

Field

Advanced Search

☐ **ADF CoreData**

☐ **ADI CoreData**

☐ **ADOPMF CoreData**

17. Indicate how the value should be adjusted:

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

What is the base value?

Use Value Directly from Bid

A field taken from the PBP

bdCoinsuranceAmount

NOT EQUALS

How should this value be adjusted?

☐ To Lower Case - Change all letters to lowercase

☐ Drop Zero Decimal - Remove the decimal point and everything after it if the trailing numbers are zeros, for example, 25.00 becomes 25

☐ Add Thousands Separators - Add commas to separate thousands, for example, 10000 becomes 10,000

☐ Combine multi-part values into a single value as a comma-separated list

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

SECTION B: #10B TRANSPORTATION SERVICES - BASE 3

Name	Original	Transformed
Trips_No_Format		Typing in this sentence.taxi Typing in this sentence.rideshare services Typing in this sentence.bus/subway Typing in this sentence.medical transport <input checked="" type="checkbox"/>
Trips_With_Format		Typing in this sentence.taxi, rideshare services, bus/subway, medical transport <input checked="" type="checkbox"/>

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

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

Rule ID	Rule Condition	Rule Value	Media Type Variants	Actions
1	(always runs when reached)	"This is default"	Default,ANOC,EOC	
2	(always runs when reached)	(no value)	Default,ANOC	
3	(always runs when reached)	(no value)	Default,ANOC,EOC	
4	(always runs when reached)	(no value)	Default,ANOC	
5	(always runs when reached)	"Default all"	Default,ANOC	

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

- a. Click the edit icon to edit the transformation.
- b. Click the duplicate icon to make a copy of your transformation that you might edit to create a different transformation
21. Click **Remove or Reorder** to change your transformation order or remove a transformation.

Rule ID	Rule Condition	Rule Value	Media Type Variants	Actions
1	(always runs when reached)	"This is default"	Default,ANOC,EOC	
2	(always runs when reached)	(no value)	Default,ANOC	
3	(always runs when reached)	(no value)	Default,ANOC,EOC	
4	(always runs when reached)	(no value)	Default,ANOC	

















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

When you are satisfied with your rule, click Save. The rule is added to the list of rules in Data Grid Fields.

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

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


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

Transformation Rules				
Global   + Find & Replace				
Conditional Rule Transformations				
Define a sequence of cases, each indicating its own computed value.				
Add A Rule Transformation				
Rule ID	Rule Condition	Rule Value	Media Type Variants	Actions
1	(PBP: Benefit Details > MC > 15-1: Medicare Part B Insulin Drugs > Coinsura...	"\$0 copay"	Default	 
2	(PBP: Benefit Details > MC > 15-1: Medicare Part B Insulin Drugs > Coinsura...	"The PBP report indicates a copayment and a coinsurance for this benefit. Pl...	Default	 
3	(PBP: Benefit Details > MC > 15-1: Medicare Part B Insulin Drugs > Coinsura...	DropZeroDecimal(PBP: Benefit Details > MC > 15-1: Medicare Part B Insulin ...	Default	 
4	(PBP: Benefit Details > MC > 15-1: Medicare Part B Insulin Drugs > Copaym...	"\$" + DropZeroDecimal(PBP: Benefit Details > MC > 15-1: Medicare Part B In...	Default	 
5	(PBP: Benefit Details > MC > 15-1: Medicare Part B Insulin Drugs > Coinsura...	DropZeroDecimal(PBP: Benefit Details > MC > 15-1: Medicare Part B Insulin ...	Default	 
6	(PBP: Benefit Details > MC > 15-1: Medicare Part B Insulin Drugs > Copaym...	"\$" + DropZeroDecimal(PBP: Benefit Details > MC > 15-1: Medicare Part B In...	Default	 
7	(always runs when reached)	"ERROR"	Default	 


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

Edit Transformation Field

To edit a transformation field:

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

Data Grid Fields

Rules for field P_Dental_office_IN (16a Preventive Dental - non-MC Office) 

Field Description

Description



Prev dental - IN Office visit (combined svcs) cost

Save Cancel

This will appear in exports and can be used to search.

Transformation Rules







HMO - MAPD / HMO - MA / HMO - DSNP / HMO - CSNP / HMO - ISNP / PFFS - PFFS, PPO - MA / PPO - MAPD, HMOPOS - MA / HMOPOS - MAPD


  + Find & Replace

Conditional Rule Transformations

Define a sequence of cases, each indicating its own computed value.

Add A Rule Transformation

Rule ID	Rule Condition	Rule Value	Media Type Variants	Actions
1	(NOT (PBP: Benefit Offerings > non-MC > nonMedicareBenefitOfferingDetails > 16a...	""	Default	 
2	(PBP: Benefit Offerings > non-MC > nonMedicareBenefitOfferingDetails > 16a1: Ora...	""	Default	 
3	(PBP: Benefit Details > non-MC > 16a: Preventive Dental > DentalCoinsuranceCom...	""	Default	 

- Follow the same editing steps as when creating a new rule. See *Data Grid Fields*.
- Click the edit icon  on a rule in the list of Rule Transformations to further edit any transformation. The Edit Transformation screen displays:

Edit Rule #2 for field "Part_B_insulin_IN" in Header "15 Medicare Part B Rx Drugs - MC Insulin"

Previous Next

Condition

Fire this rule when ALL of the following conditions are met:

☐
☒

PBP Field > Benefit Details > MC > 15-1. Medicare Part B Insulin Drugs > InsuranceComponent > bcInsuranceAmountFreshToMinMax
AS-IS

CONTAINS

The value: "Yes"
AS-IS

☐
☒

PBP Field > Benefit Details > MC > 15-1. Medicare Part B Insulin Drugs > CopaymentComponent > bcCopaymentAmountFreshToMinMax
AS-IS

CONTAINS

The value: "Yes"
AS-IS

Add a Condition

Value Transformation

Select Media Type Variant:
Global default

Add Media Type Variant:
Media Type Variant Name
Add New Clone Selection


Use a combination of plain text values and values from PBP fields to build a transformed value.

☐
☒

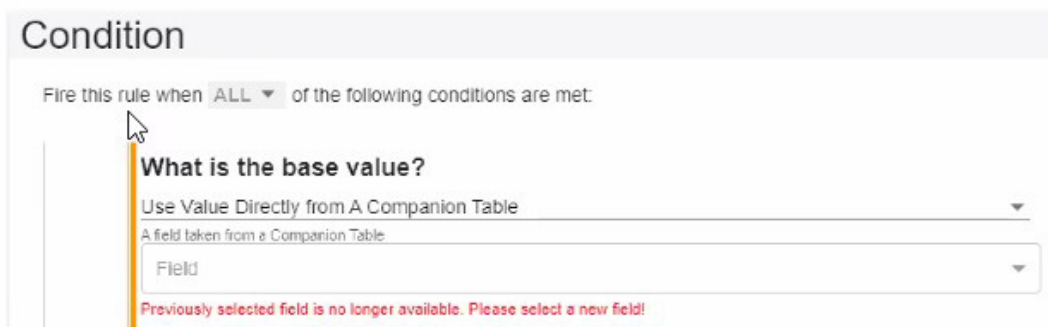
The value: "The PBP report indicates a copayment and a coinsurance for this benefit. Please review the appropriate _Notes field and update the custom field as needed."
AS-IS



Add Another Piece

Close

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

Edit Rule #1 for field "zADAP" in Header "CONTACTS: ADAP"




- b. Click the wastebasket icon  to delete the condition or transformation.
 - c. If you have more than one condition or transformation, click the up or down arrows to change the order in the list
 - d. Click the checkmark  to save your changes
2. Click **Cancel Changes** at any time to cancel any updates you have made to the conditional transformation for this rule.
 3. After you have saved all your condition and value transformation changes with the checkmarks, the Cancel Changes button changes to the Close button.
 - a. Click **Close** to return to the updated screen for that field

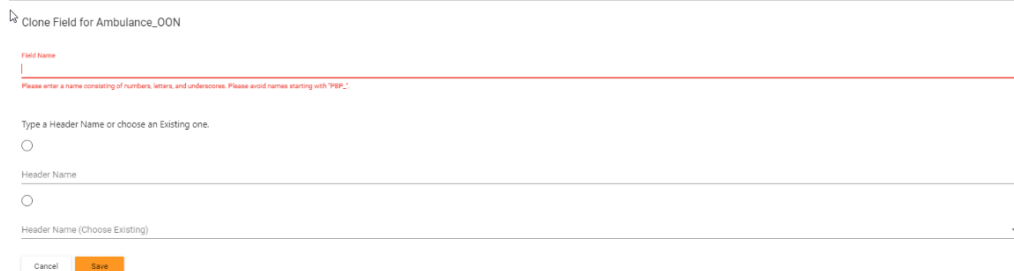
OR

 - b. Click **Previous** or **Next** to edit the previous or next rule in the list. The header for the page gives the rule number you are working on currently.
NOTE: The **Previous** and **Next** buttons are greyed out while you are editing a condition or transformation

Clone Field

You can clone a field to apply on another field.

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



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


Error occurred

Failed to submit data. Error details: The name SBTEST3620 is already used by 1 active field(s).

Close

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

Delete Field

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

Delete Field

Are you sure you wish to delete this Field?

Cancel

Delete

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

Global Find & Replace

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

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

Global Find and Replace within Rules

1 Enter details 2 Preview 3 Results

Filter Fields

Text to Replace

Text to Use Instead

Which part of the rule should be searched?

☒ Whole Rule

☐ Condition Only

☐ Value Only

Search Type

☒ Any Match

☐ Whole Word (including letters, numbers, and special characters)

☐ Match Case (Text to Replace would be Case Sensitive)

☐ Only apply to a single Media Type Variant

Preview Changes

Cancel

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

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

Global Find and Replace within Rules

1 Enter details 2 Preview 3 Results

Filter Fields

Text to Replace

Text to Use Instead

Which part of the rule should be searched?

☒ Whole Rule

☐ Condition Only

☐ Value Only

Search Type

☒ Any Match

☐ Whole Word (including letters, numbers, and special characters)

☐ Match Case (Text to Replace would be Case Sensitive)

☒ Only apply to a single Media Type Variant

Global (Default)

Preview Changes

Cancel

- a. From the dropdown list, select a single Media Type Variant to refine your search
8. Optionally select the checkbox to Match Case when finding and replacing text.
9. Click **Preview Changes**. The wizard displays the text you searched for and the replacement text, as well as how many replacements will result from your find and replace and in how many rules.

Global Find and Replace within Rules

1 Enter details 2 Preview 3 Results

Replacing **Copay** with **Copayment** in each Rule. Results in 3 replacements across 2 Rules.

Proceed with replacement?

Change Search Replace

Cancel

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

Global Find and Replace within Rules

1 Enter details 2 Preview 3 Results

Successfully replaced **Copay** with **Copayment** in each Rule. Made 3 replacements across 2 Rules.

Close

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

Update Field Headers

You can find and replace changed JSON Bid Report Headers when CMS changes header names or moves benefits between screens in the HPMS software that is used to create the PBP Bid Reports. For example, CMS might change 16b Medicare-Covered Comprehensive Dental to another header like 16a Medicare-Covered Dental. When you produce a new year over year Import, for example, Import CY23 versus CY24, the PBP Module flags changes. Changed headers display as red (deleted) and green (added) pairs. Use **Update Field Headers** to make these replacements.

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

Update Field Lookup Headers Within Rules

1 Enter details 2 Preview 3 Results

Current Header Name

New Header Name

Preview Changes

Cancel

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

Update Field Lookup Headers Within Rules

1 Enter details 2 Preview 3 Results

Successfully updated SECTION B: #3 CARDIAC AND PULMONARY REHABILITATION SERVICES - BASE 3 to SECTION B: #3 CARDIAC AND PULMONARY REHABILITATION SERVICES - BASE 1 in each Rule. Made 6 updates across 2 Rules.

Close

5. Click **Close**.

Rule Extensions

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

Rule Extensions

Rule Extensions

Rule Extensions are usable pieces of functionality that transform a value based on a set of parameters. They can be used in rules to simplify rule computation.

[New Extension](#)

Name	Updated By	Updated On ↓	Created By	Created On	Actions
ParseServiceArea	Brian Yavorsky	12/16/20	Brian Yavorsky	12/16/20	↩ ✎ 🗑
SectionB7b_Chiro_OON_GroupContainsChk	Brian Yavorsky	12/5/20	Brian Yavorsky	12/5/20	↩ ✎ 🗑
CountyExtraction	Brian Yavorsky	10/28/20	Brian Yavorsky	10/28/20	↩ ✎ 🗑
SBTest92220	Stephen Billias	9/22/20	Stephen Billias	9/22/20	↩ ✎ 🗑

Items per page: 25 1 - 4 of 4 < >

The CodySoft® PBP Module comes with the following extensions installed:

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

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

New Extension

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

Rule Extensions

Rule Extension

✓ Name

Transform your value in Steps

Apply a series of Steps to transform a value. Most Steps have options or values that further adjust the transformation. Steps are applied in the order they appear on the page. You can change this order when adding Steps.

Define Parameters for Flexibility

When a Step requires a value, you can provide one when you add the Step, or you can create a Parameter so that each Rule that uses the Extension can provide a unique value. Parameters are named placeholders that the Rule fulfills. You can select Parameters by name when building Steps.

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

Rule Extensions

Rule Extension: SBTest012521 ✎

Transform your value in Steps

Apply a series of Steps to transform a value. Most Steps have options or values that further adjust the transformation. Steps are applied in the order they appear on the page. You can change this order when adding Steps.

Select the checkmark ✓ to finish editing this Step.

✓ Trim Characters from Values

<p>Characters to Remove</p> <p>Type a Value Here</p> <p>Value</p> <p>Case Sensitive?</p> <p>Case Sensitive?</p> <p>No</p>	<p>Where to Remove?</p> <p>Where to Remove?</p> <p>Both Sides</p>	<p>Search Type</p> <p>Search Type</p> <p>Whole Word (including letters, numb...</p>
---------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------	-------------------------------------------------------------------------------------

- a. Select **Type a Value Here** to enter a value
or
 - b. Select **Choose a Value When Building Rule** to select a previously defined Parameter when creating or editing a field
 - c. Select where to remove the character(s), either before, after or on both sides of the specified value
 - d. Select whether to search for a whole word, partial match, or any match on the value you specify
8. When you have made your selections for the step, click the checkmark ✓ to finish editing the step
 9. Add more steps if necessary
 10. Click **Add Parameter** to create a new Parameter
 11. Enter a **Parameter Name**
 12. Enter a **Default Value** for the parameter.
 13. When you have made your selections for the parameter, click the checkmark ✓ to finish editing the parameter
 14. Click **Save**. The new extension is added to the list

Edit Extension

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

Rule Extensions

Rule Extensions are usable pieces of functionality that transform a value based on a set of parameters. They can be used in rules to simplify rule computation.

[New Extension](#)

Name	Updated By	Updated On ↓	Created By	Created On	Actions
StephenTest-52020	Stephen Billias	5/20/20	Stephen Billias	5/20/20	
StephenTest2	Stephen Billias	5/20/20	Stephen Billias	5/20/20	
OutOfNetwork/Contains	Brian Yavorsky	5/5/20	Brian Yavorsky	5/5/20	
Create comma delimited list	Stephen Billias	4/30/20	Stephen Billias	4/30/20	
Lower Case List	Brian Yavorsky	4/29/20	Brian Yavorsky	4/29/20	

Items per page: 25 1 - 5 of 5 < >

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

Rule Extensions

Rule Extension: StephenTest-52020

[Saved](#)

Transform your value in Steps

Apply a series of "Steps" to transform a value. Most Steps have options or values that you may specify to further adjust the transformation. Create "Parameters" below in order to provide some values later, when building a Rule. The Steps are applied in the order they appear on the page, which may be edited.

Join Multi Part Value

Join With: -

Add a Step [Add](#)

Define Parameters For Flexibility

When a Step requires a value, you can choose not to provide it yet, so that each Rule that uses this Extension can provide its own value. To do this, create a named placeholder, or Parameter, that the Rule will fulfill. You can then select a Parameter by name when building Steps above.

Change 0 to 1: 1

Change 1 to 0: 0

[Add Parameter](#)

[Saved](#)

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

Delete Extension

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

Rule Extensions

Rule Extensions are usable pieces of functionality that transform a value based on a set of parameters. They can be used in rules to simplify rule computation.

[New Extension](#)

Name	Updated By	Updated On ↓	Created By	Created On	Actions
StephenTest-S2020	Stephen Billias	5/20/20	Stephen Billias	5/20/20	
StephenTest2	Stephen Billias	5/20/20	Stephen Billias	5/20/20	
OutOfNetworkContains	Brian Yavorsky	5/5/20	Brian Yavorsky	5/5/20	
Create comma delimited list	Stephen Billias	4/30/20	Stephen Billias	4/30/20	
Lower Case List	Brian Yavorsky	4/29/20	Brian Yavorsky	4/29/20	

Items per page: 25 1 - 5 of 5 < >

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

Unable To Delete Pipeline Create comma delimited list

This pipeline is in use by the following fields and cannot be deleted.

- Chiro_ref (in header SECTION B: #7B CHIROPRACTIC SERVICES - BASE 2)
- CARDIAC_IN (in header SECTION B: #3 CARDIAC AND PULMONARY REHABILITATION SERVICES - BASE 1)

[Cancel](#)

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

Delete Rule Extension SBTest92220

Are you sure you wish to delete the Rule Extension named SBTest92220?

[Cancel](#)

[Confirm Delete](#)

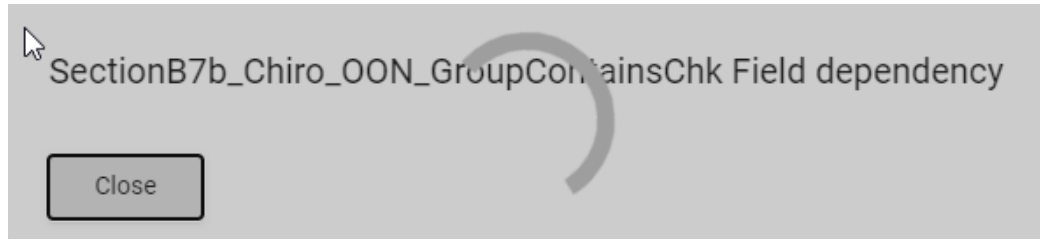
- d. Click **Confirm Delete** to delete the extension from the list

Display Data Grid Fields That Use Extension

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

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

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

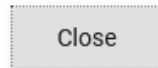


When processing is completed, the module displays the list of fields that are using the rule Extension:

SectionB7b_Chiro_OON_GroupContainsChk Field dependency

This Rule Extension is in use by the following fields.

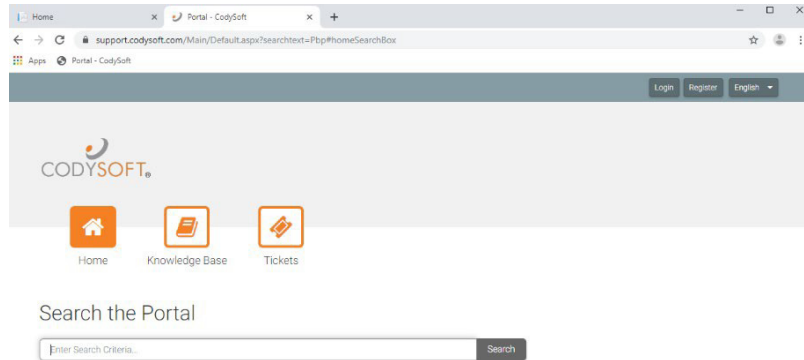
- [Chiro_OON \(in header 7b Chiropractic Svcs - MC - OON\)](#)
- [PH_OON \(in header 5 Partial Hospitalization - MC - OON\)](#)
- [HHS_OON \(in header 6 Home Health Svcs - MC - OON\)](#)
- [PCP_OON \(in header 7a Primary Care Physician Svcs - MC - OON\)](#)
- [Chiro_rou_OON \(in header 7b Chiropractic Svcs - non-MC - OON\)](#)
- [Chiro_other_OON \(in header 7b Chiropractic Svcs - non-MC Other - OON\)](#)



Support

In the Support Portal, CodySoft® provides several ways to get more information about how to use the CodySoft® product.

1. From any screen in CodySoft, click **Help** in the upper right corner of the screen to enter the Support Portal. The Support Portal home screen displays:



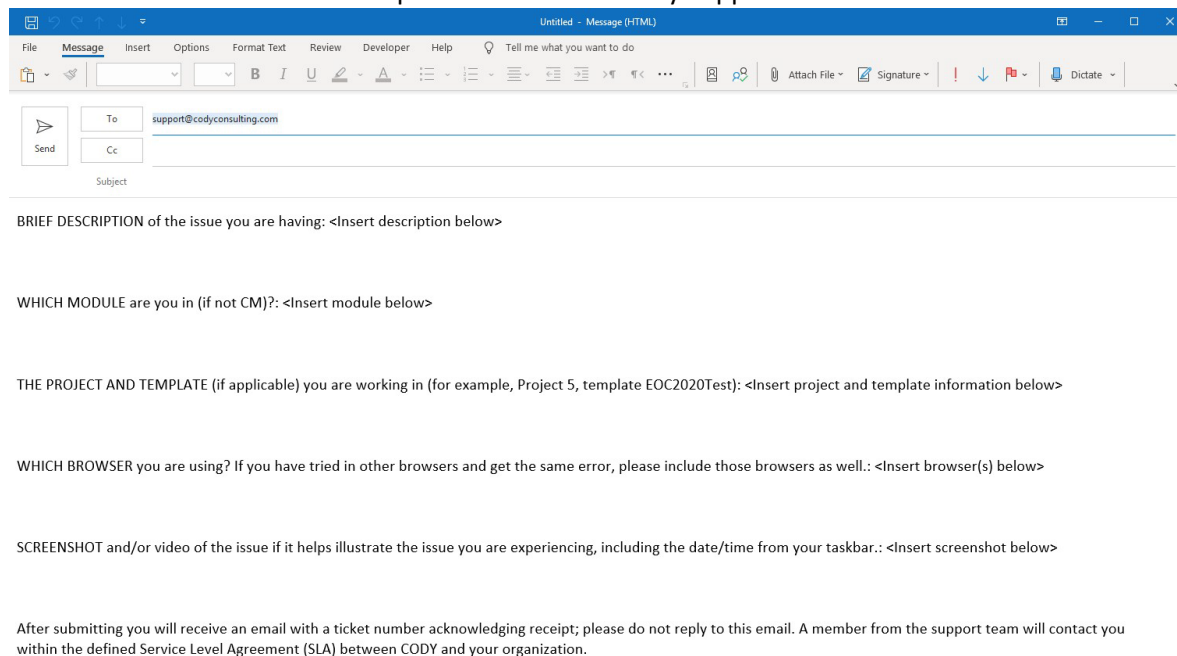
2. From the Support Portal home screen, you have three choices:
 - a. Knowledge Base
 - b. Tickets
 - c. Search the Portal

Using the Knowledge Base

1. Click **Knowledge Base** to enter the Knowledge Base
 - a. Enter a Search term
 - b. Click Search to look for topics related to your search criteria. The system displays a list of relevant Knowledge Base topics.
 - c. The Knowledge Base choice provides links to user guide documents on many CODY modules, including the CodySoft® PBP Module.

Open a Ticket

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



Send To: support@codyconsulting.com

Subject:

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.: <Insert screenshot below>

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.

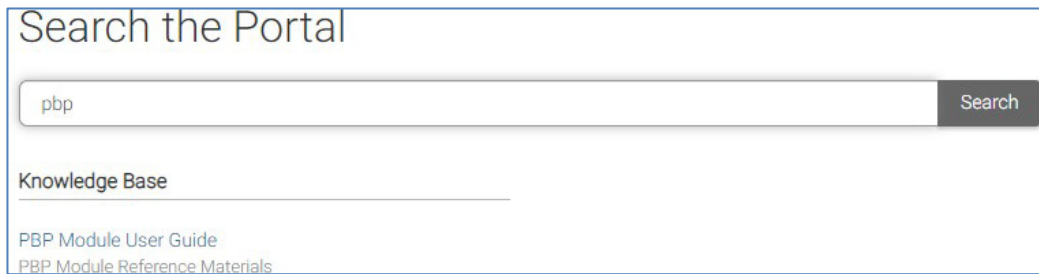
3. Fill out the email, providing as much information as possible for each requested item:
 - a. Description
 - b. Module
 - c. Project/Template
 - d. Browser
 - e. Attached screenshot or video

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.



Search the Portal

pbp Search

Knowledge Base

[PBP Module User Guide](#)

[PBP Module Reference Materials](#)