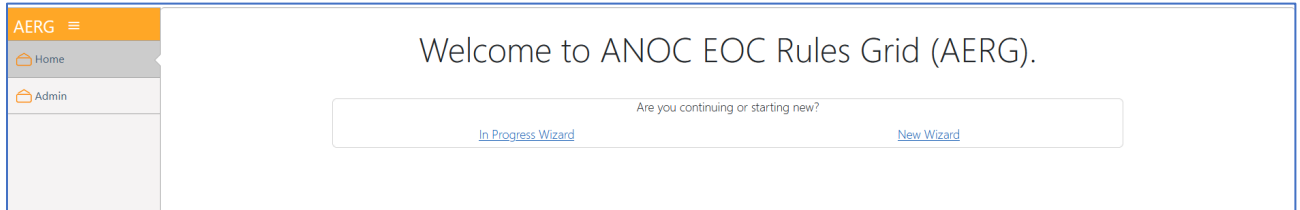


CodySoft® April 4th 2024 release notes

AERG Wizard – new!

The ANOC-EOC Rules Grid (AERG) Wizard automates content development and validation of CMS-required ANOC and EOC content that isn't found in a PBP Bid Report.



1. Content development process
 - a) A Project Manager **assigns** Subject Matter Experts and **tracks** responses.
 - b) Assigned SMEs walk through a **dynamic set of questions** and identify applicable PBPs for each question. Some questions are programmatically assessed based on previously completed questions instead of asking for a SME to respond.
 - c) Each AERG Wizard question is associated with an **“AERG” rule** in the CodySoft® ANOC and EOC templates. Within each question screen in the Wizard, SMEs may click on the CodySoft® **templates that give context** during PBP selection.
2. Each question’s **response status is tracked**, and each subject matter area (Section) status is also tracked.
3. Software transforms SME responses into a completed, PBP-specific **ANOC-EOC Rules Grid xls data asset** for use with CodySoft® ANOC and EOC template projects in the Collateral Management (CM) module. X’s are automatically populated in PBP-specific cells for each applicable rule.
4. The AERG file can be **automatically transferred to the CM module** from the AERG Wizard screen and used for PBP-specific versioning of documents.

Stay tuned for more information about the new AERG Wizard in the coming weeks.

Upgraded Admin Dashboard

The Admin Dashboard has been upgraded with a new and improved look and feel. Client Admins will manage all global data such as Lines of Business, Media Types, and Plan Data here. Users can still launch into modules directly from here, now in just a single click from the left-hand side:



Welcome to csDashboard.

The Dashboard module

Please use the left menu to navigate through the app.

User Management is still available with no changes to existing functionality and will be upgraded in the future. Navigation is seamless between the two by using the User Management and Admin Dashboard selections from each on the left-hand side.