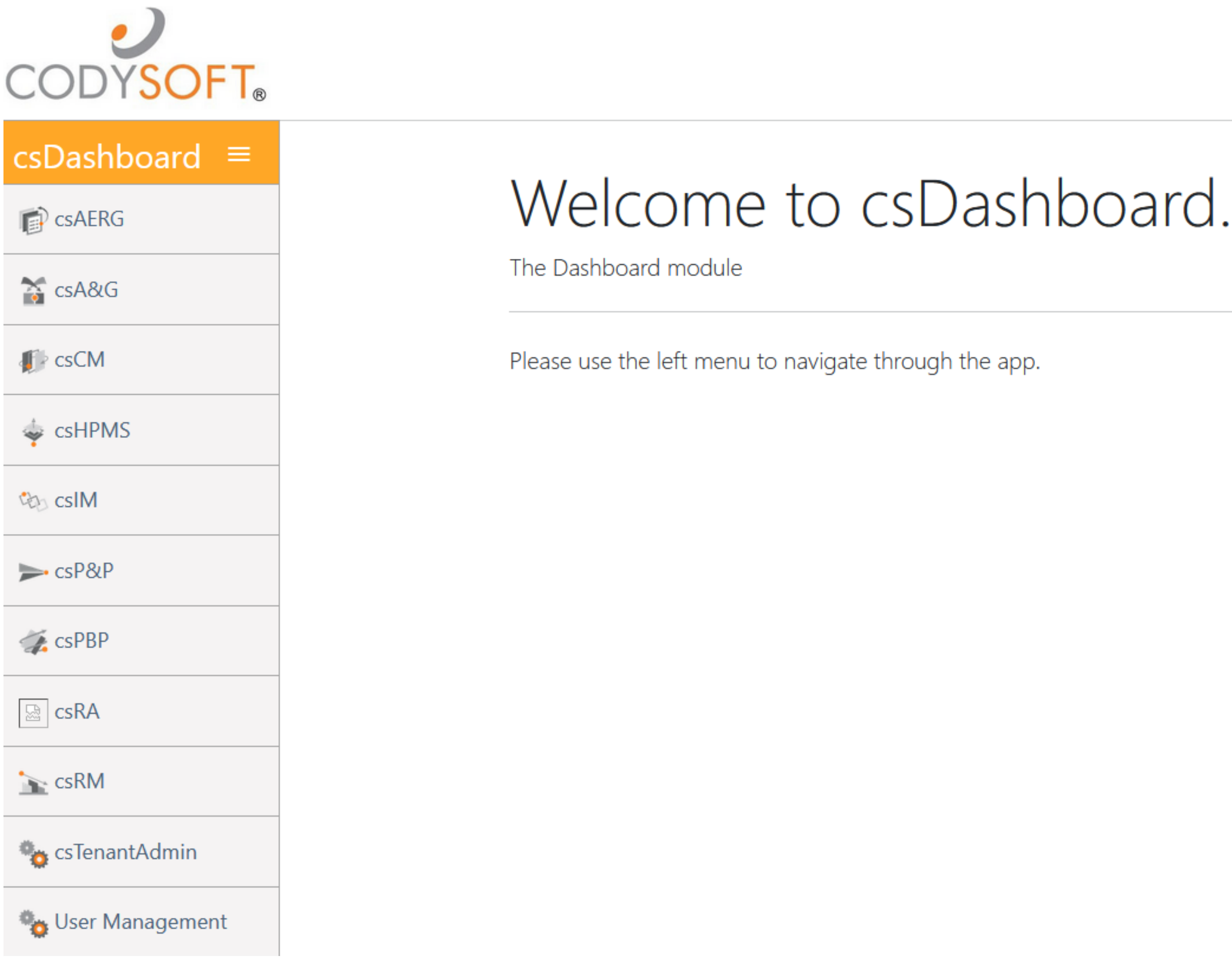
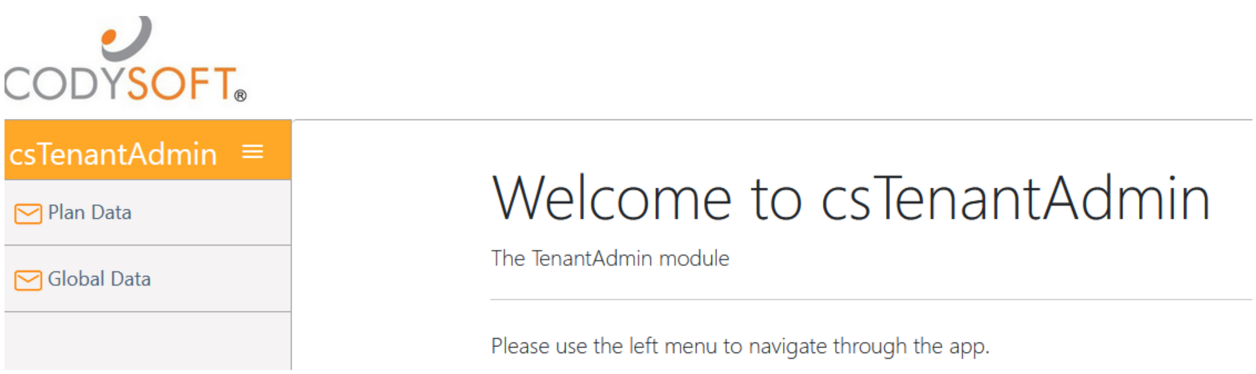
System Administration

csTenantAdmin dashboard

After logging in, the System Administrators can manage non-user related content by clicking on **csTenantAdmin** on the lefthand side. Note your selections may vary depending on your permissions:



Users are then presented with 2 selections on the lefthand side, Plan Data and Global Data:



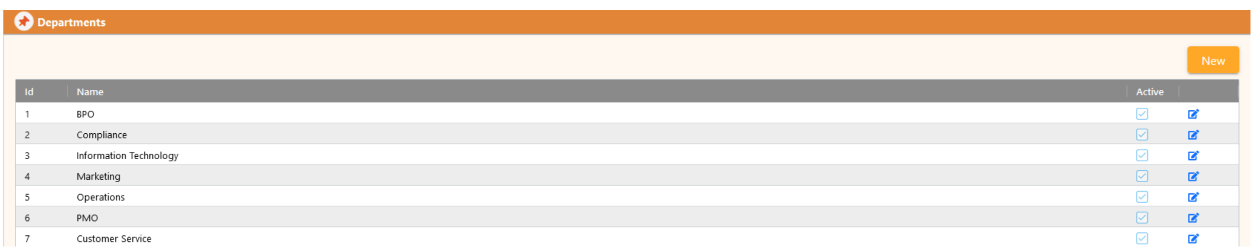
Global Data

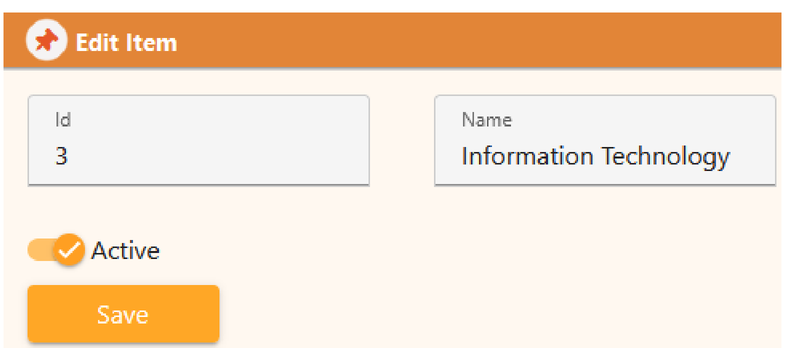
Select **Global Data** and you will be presented with the following section tabs:

1. Lines of Business
    - Click New to add a new Line of Business or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.

    - Note – you must flag 'Has CMS Plans?' toggle for plans within the Medicare Line of Business

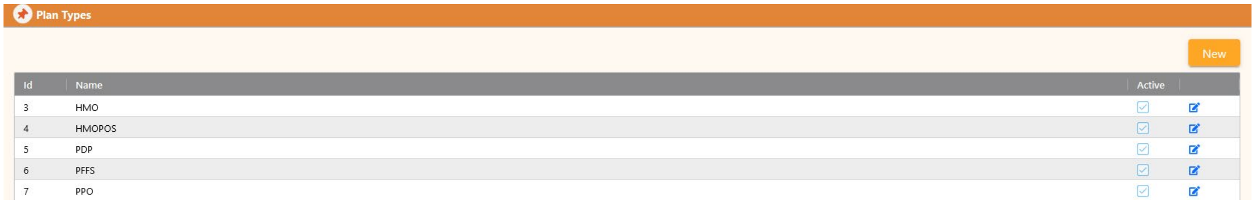
2. Departments
    - Click New to add a new Department or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.



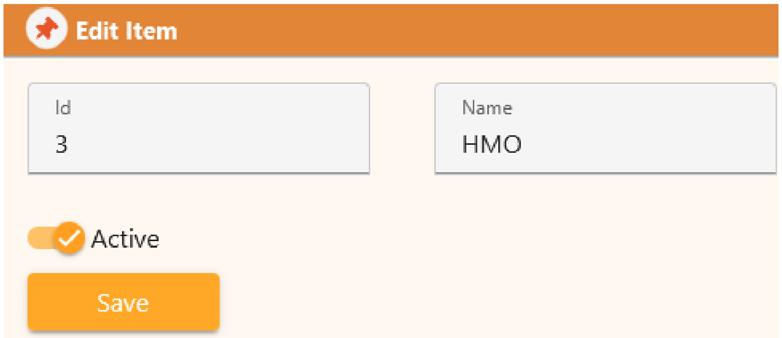


3. Plan Types
    - Click New to add a new Plan Type or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.

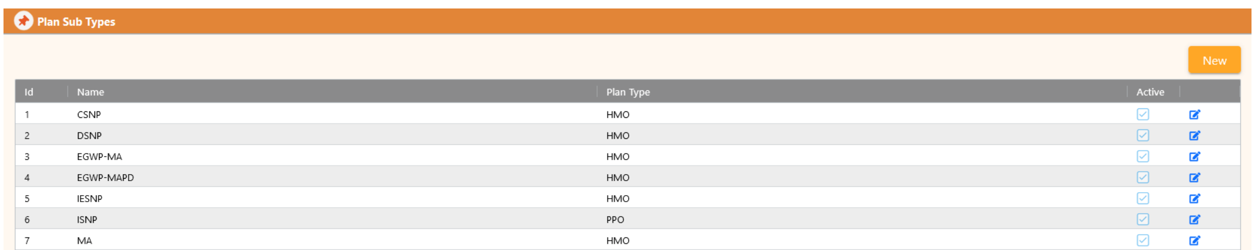
- Note: Plan Types will be selectable in a dropdown in the Sub Plan Type New/Edit screens as well.



Id	Name	Active	
3	HMO		
4	HMOPOS		
5	PDP		
6	PFFS		
7	PPO		



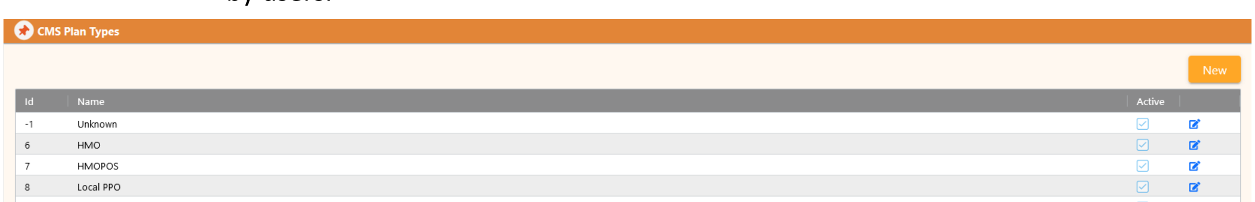
4. Plan Sub Types
   - Click New to add a new Plan Sub Type or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.



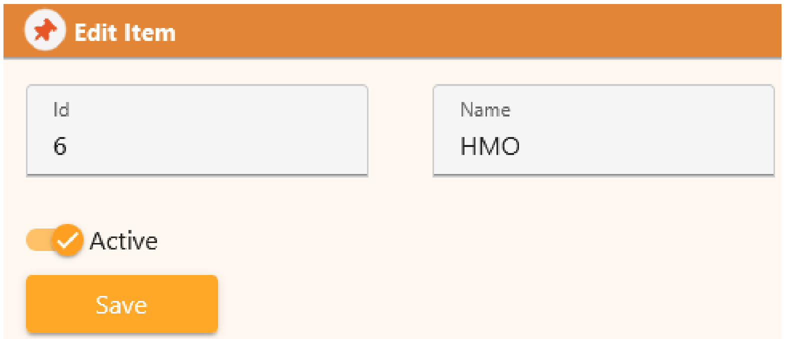
Id	Name	Plan Type	Active	
1	CSNP	HMO		
2	DSNP	HMO		
3	EGWP-MA	HMO		
4	EGWP-MAPD	HMO		
5	IESNP	HMO		
6	ISNP	PPO		
7	MA	HMO		

   - Note: Sub Type must be linked to a Plan Type by selecting one from the Plan Type Dropdown

5. CMS Plan Types
   - To activate or inactivate a CMS Plan Type, click the icon to edit an existing, and toggle the Active button. The Id field is system generated and is not fillable/editable by users.

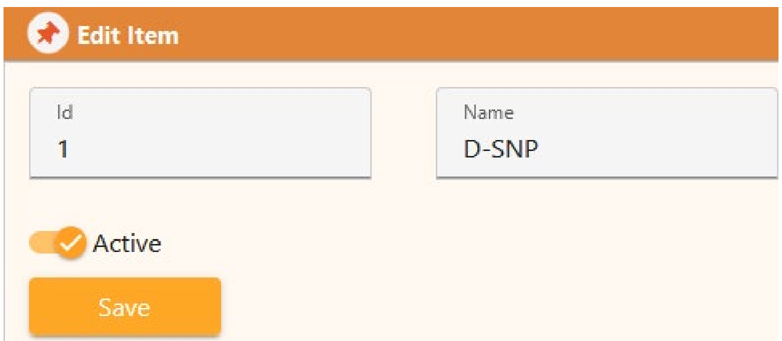


Id	Name	Active	
-1	Unknown		
6	HMO		
7	HMOPOS		
8	Local PPO		
9	PSO (State License)		

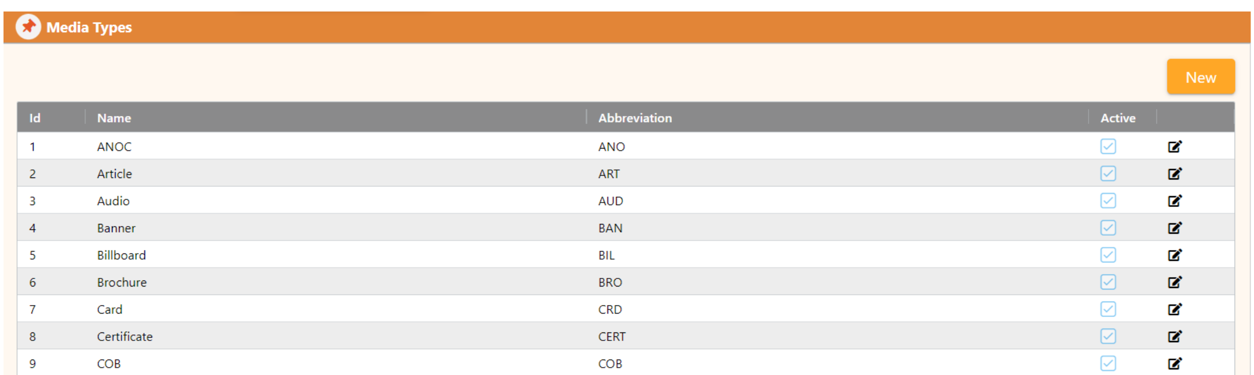


6. SNP Types
    - To activate or inactivate a SNP Type, click the icon to edit an existing, and toggle the Active button. The Id field is system generated and is not fillable/editable by users.

Id	Name	Active	
1	D-SNP		
2	C-SNP		
3	I-SNP		
43	IE-SNP		

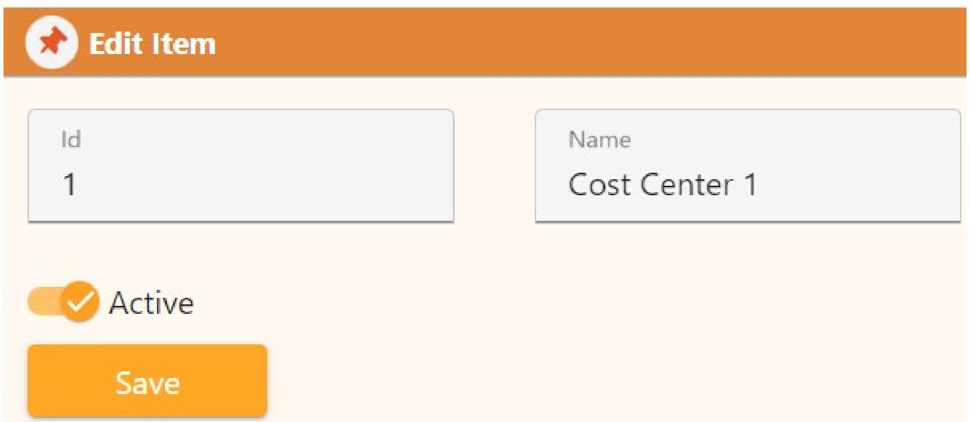


7. Media Types
    - Click New to add a new Media Type or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.

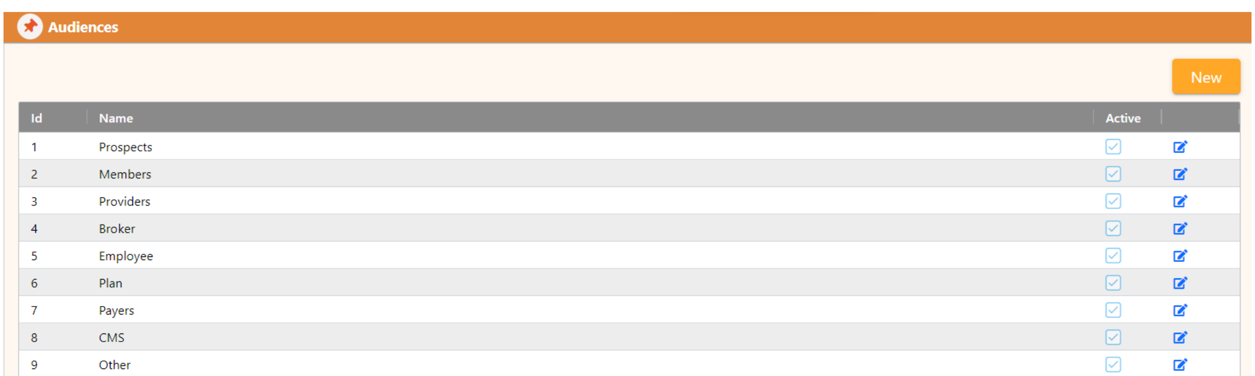


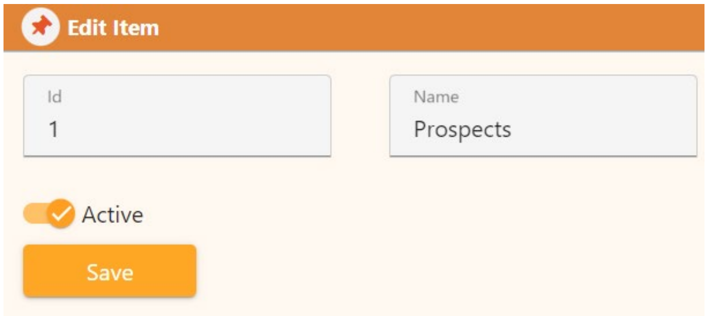
Id	Name	Abbreviation	Active	
1	ANOC	ANO		
2	Article	ART		
3	Audio	AUD		
4	Banner	BAN		
5	Billboard	BIL		
6	Brochure	BRO		
7	Card	CRD		
8	Certificate	CERT		
9	COB	COB		

8. Cost Centers
    - Click New to add a new Cost Center or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.



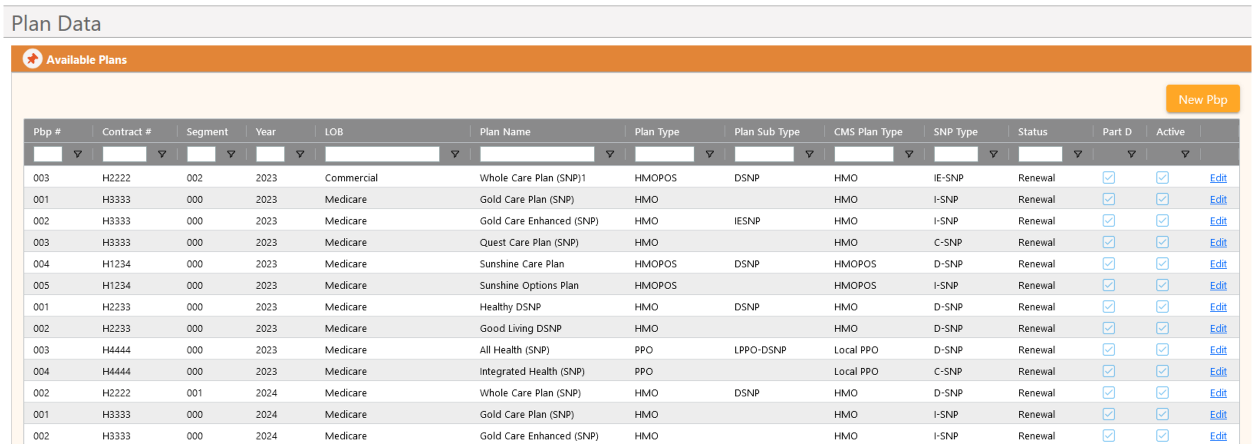
9. Audiences
    - Click New to add a new Audience or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.





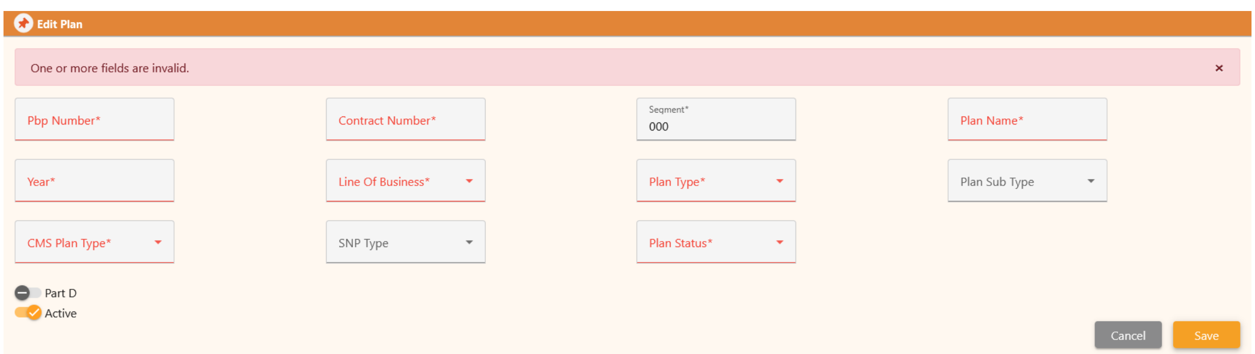
Plan Data

Select **Plan Data** and you will be presented with the following table showing all plans. Note: Users can use the boxes at the top of each column to filter down to the specific data they are looking for.



Pbp #	Contract #	Segment	Year	LOB	Plan Name	Plan Type	Plan Sub Type	CMS Plan Type	SNP Type	Status	Part D	Active	
003	H2222	002	2023	Commercial	Whole Care Plan (SNP)1	HMOPOS	DSNP	HMO	IE-SNP	Renewal	✓	✓	Edit
001	H3333	000	2023	Medicare	Gold Care Plan (SNP)	HMO		HMO	I-SNP	Renewal	✓	✓	Edit
002	H3333	000	2023	Medicare	Gold Care Enhanced (SNP)	HMO	IESNP	HMO	I-SNP	Renewal	✓	✓	Edit
003	H3333	000	2023	Medicare	Quest Care Plan (SNP)	HMO		HMO	C-SNP	Renewal	✓	✓	Edit
004	H1234	000	2023	Medicare	Sunshine Care Plan	HMOPOS	DSNP	HMOPOS	D-SNP	Renewal	✓	✓	Edit
005	H1234	000	2023	Medicare	Sunshine Options Plan	HMOPOS		HMOPOS	I-SNP	Renewal	✓	✓	Edit
001	H2233	000	2023	Medicare	Healthy DSNP	HMO	DSNP	HMO	D-SNP	Renewal	✓	✓	Edit
002	H2233	000	2023	Medicare	Good Living DSNP	HMO		HMO	D-SNP	Renewal	✓	✓	Edit
003	H4444	000	2023	Medicare	All Health (SNP)	PPO	LPPO-DSNP	Local PPO	D-SNP	Renewal	✓	✓	Edit
004	H4444	000	2023	Medicare	Integrated Health (SNP)	PPO		Local PPO	C-SNP	Renewal	✓	✓	Edit
002	H2222	001	2024	Medicare	Whole Care Plan (SNP)	HMO	DSNP	HMO	D-SNP	Renewal	✓	✓	Edit
001	H3333	000	2024	Medicare	Gold Care Plan (SNP)	HMO		HMO	I-SNP	Renewal	✓	✓	Edit
002	H3333	000	2024	Medicare	Gold Care Enhanced (SNP)	HMO		HMO	I-SNP	Renewal	✓	✓	Edit

Click New Pbp to add a new plan or click Edit on the row of the plan you wish to edit to edit an existing. Fields in red below are required. Note: the values in each of the dropdowns are populated with the data entered in **Global Data** screens shown earlier in the guide.



Notes:

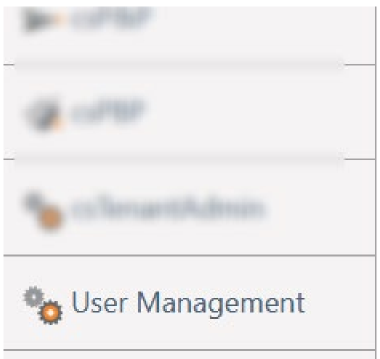
- CMS Plan Type is applicable only for plans with the Medicare Line of Business; when another Line of Business is selected that field goes away.
- SNP Type is required/applicable only for Medicare plans.
- Part D toggle button is required/applicable only for Medicare plans.
- Segment is auto populated with zero(s) based on your tenant settings, user can edit that if a non-zero segment number applies.
- When 'Crosswalk' is selected as Plan Status, user is required to select the plan it is Cross walked to.

To return to the previous screen from here, click Dashboard in the top right corner under your name:

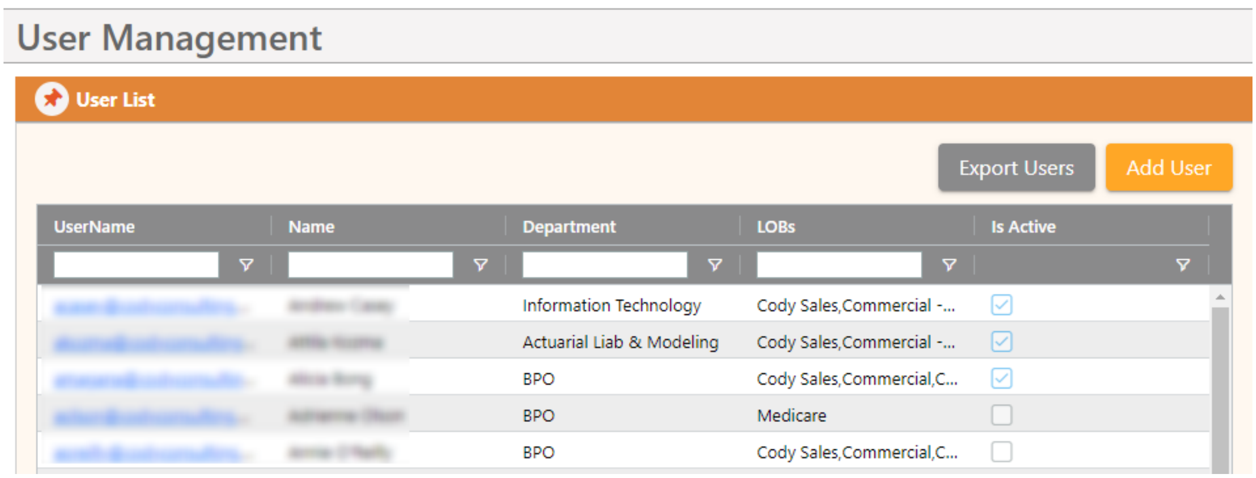
User Management

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

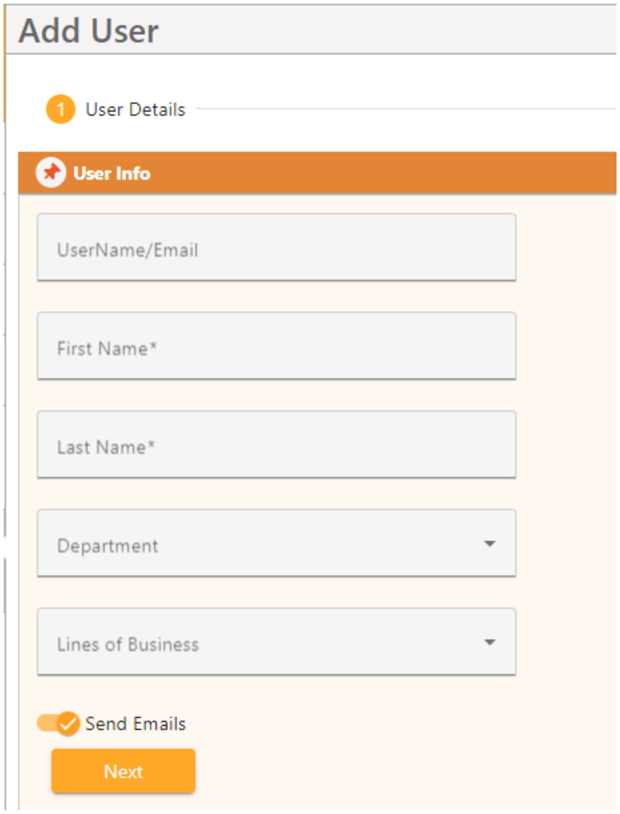
1. From the main dashboard of CodySoft®, click **User Management**.



2. All Users display, click **Add User** in the top right corner.



The **Add User** dialog box opens.



3. In the **User Details** section, enter information about the new user in the following fields:
    a. **UserName/Email**–Add user's complete email address, including @ information
    b. **First Name**
    c. **Last Name**
    d. **Department**–Select the user's department from the drop-down list
    e. **Lines of Business**–Select one or more choices from the available lines of business
    f. **Send Emails**–This toggle defaults to the ON position, the user will receive email notifications from CodySoft®.
    g. Click Next
4. In the **User Roles** section, select the checkboxes for the user roles to which the user is assigned, for each available licensed CodySoft® application. Check with your CodySoft® system administrator counterpart if you are unsure which roles to assign to a user for which applications.
5. Click **Save**. The new user is added to the list of users.

Add a Single Sign On User

Some companies have Single Sign On (SSO) where users have one username and password for multiple applications. If your company uses SSO all users setup will be setup to login under SSO.

Deactivate a User

To deactivate an existing user:

1. Select **User Management** from the main **csDashboard**

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

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

User Roles

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

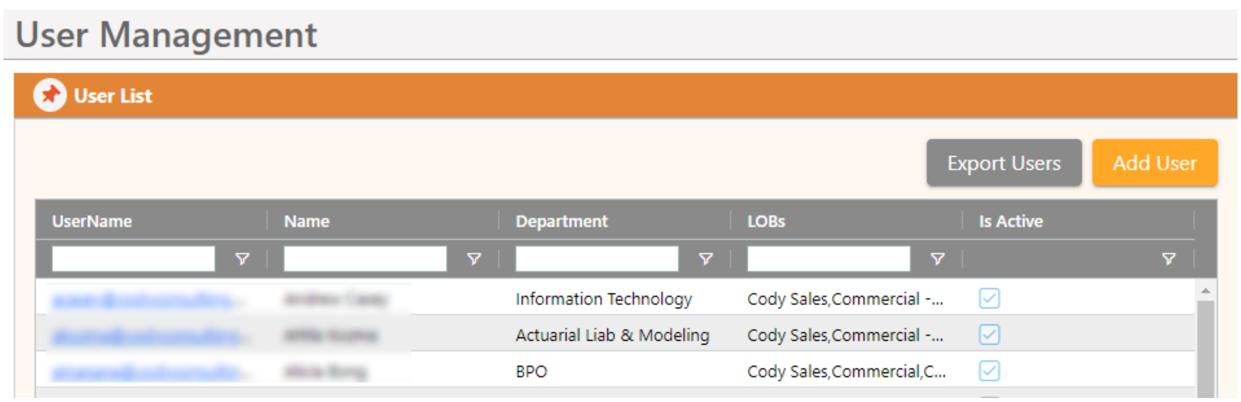
User Role	Description
Admin	The admin has client administrative rights. This user can set client-specific values for the configurable fields within the module.
All Permissions	This user has all permissions except admin rights. These permissions include compliance permissions. This is the most broad-based permission group available.
Traffic Manager	This user receives draft project requests as they are submitted. They can approve project requests and to assign project managers to the projects they have approved.
Project Manager	This user can assign tasks and approvals, approve templates and create versions of documents in the projects that they are assigned to. This person is responsible for the day-to-day management of collateral projects within the Collateral Management Module.
Document Developer* *NOTE—this role is assigned at the Project level on the Project Details tab, not as a global user role	This user will have access to the dashboard and can be assigned tasks within individual projects. They can edit documents in the Template editor, and get approvals, do template testing, create reviews and edit, download versions from the Versions tab, and can view, create and edit assets within the library. They can create rules within a template only, assign rules to projects, and edit their own rules but not other user's rules.
End User	This user will have access to the dashboard and to Projects, Discussions, Tasks, Submissions and Approvals tabs. They can be assigned tasks within individual projects. They can create projects so that they can assign project managers, and read template documents. They cannot create reviews, cancel templates, add templates, edit templates, or view revision history. and view assets within the library. They can download versions read only from the Versions tab and see and add attachments.
Compliance	This user can create and update compliance submission records.
Collateral Viewer	This user can view approved materials in the library.
Business Owner	A user with this permission will appear on the list of business owners in

User Role	Description
	the project record. No additional permissions are associated with this profile. Usually, this user will have additional permission sets associated with his or her profile.
Approver	A user with the permission will appear to the project manager as a user who can be assigned to the template approval process. Usually, this user will have additional permission sets associated with his or her profile.
Executive	Reporting rights. For users for whom you would like to be able to access reports, this permission set will be applied.
Inventory Manager	This user can upload and manage inventory reports.
Librarian	This user will have full access to view, create and edit all library items, including the CM data tool. This user will most likely have additional permission sets associated with his or her profile.

Downloading the user list

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

1. Click **Export Users** in the top right corner. The list is provided as an Microsoft Excel Comma Separated Values (.csv) file. You can open or save the file.



User Groups

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