CODYSOFT®

CollateralManagement module®

AERG Wizard

ANOC-EOC Rules Grid Wizard

For use with application release July 11, 2024

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Overview

The CodySoft® ANOC-EOC Rules Grid (AERG) Wizard automates content development and validation of Annual Notice of Changes (ANOC) and Evidence of Coverage (EOC) content that isn't found in a PBP Bid Report. The CodySoft® AERG Wizard is one of a package of CodySoft® "CM Next Gen" solutions to automate CMS-required content from Bid to Final ANOC and EOC plan-specific documents.

The AERG Wizard is an online dynamic survey wizard accessed within the CodySoft® Collateral Management Module® (CM Module). It is designed to ask via a web form only those questions that apply to an organization's specific plan types and associated plan configurations. In addition, as the users answer the questions by selecting applicable plans from a list of potential plans, the wizard is programmed to either auto-answer or ignore other questions to help reduce the total number presented to the users. The answers to these questions are then automatically converted into an XLS rules grid, called the **ANOC/EOC Rules Grid (AERG)**, which is uploaded to the CM Module to trigger an auto-write of the EOCs and ANOCs.

This guide provides you with step-by-step instructions for common AERG Wizard activities. If you have questions, please contact your CodySoft® administrator.

Accessibility
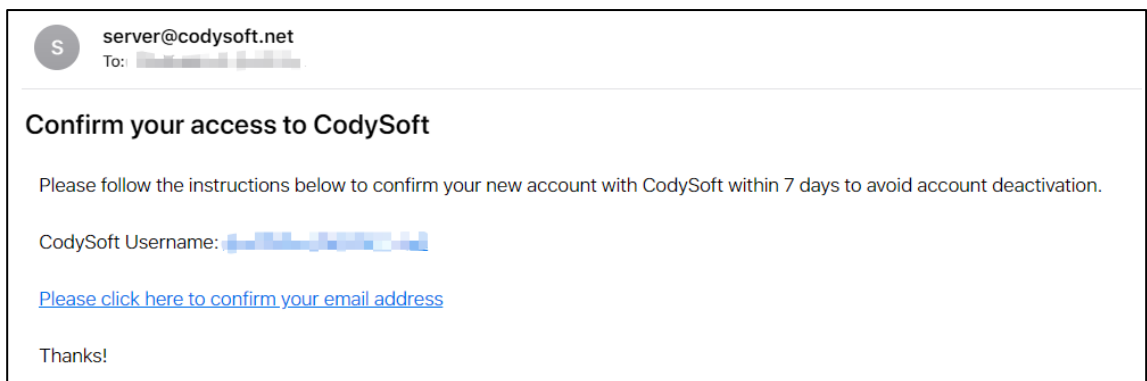
Logging in for the first time

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.

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®.
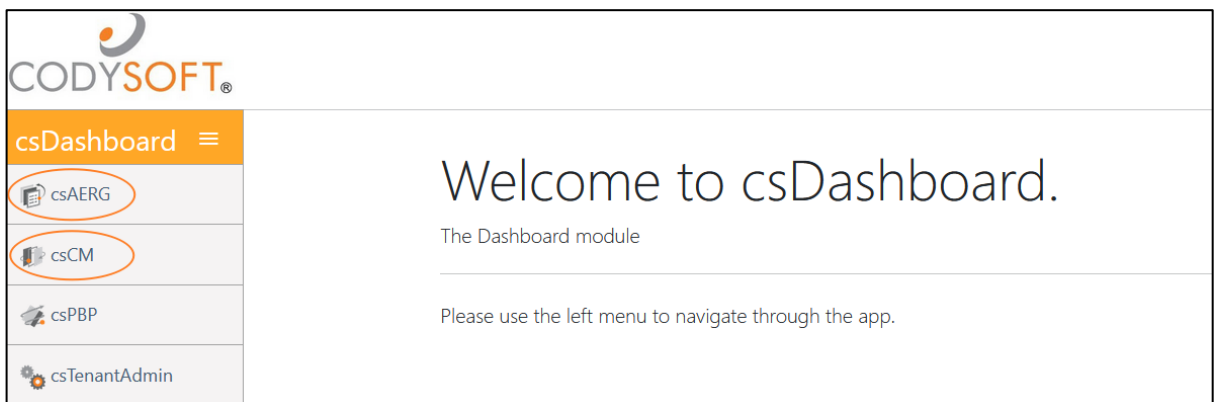
8. Click **csCM** to enter the CodySoft® Collateral Management Module®, hover your cursor on the Library menu item, and click **AERG Rules Wizard** to enter the AERG Wizard Welcome Page.
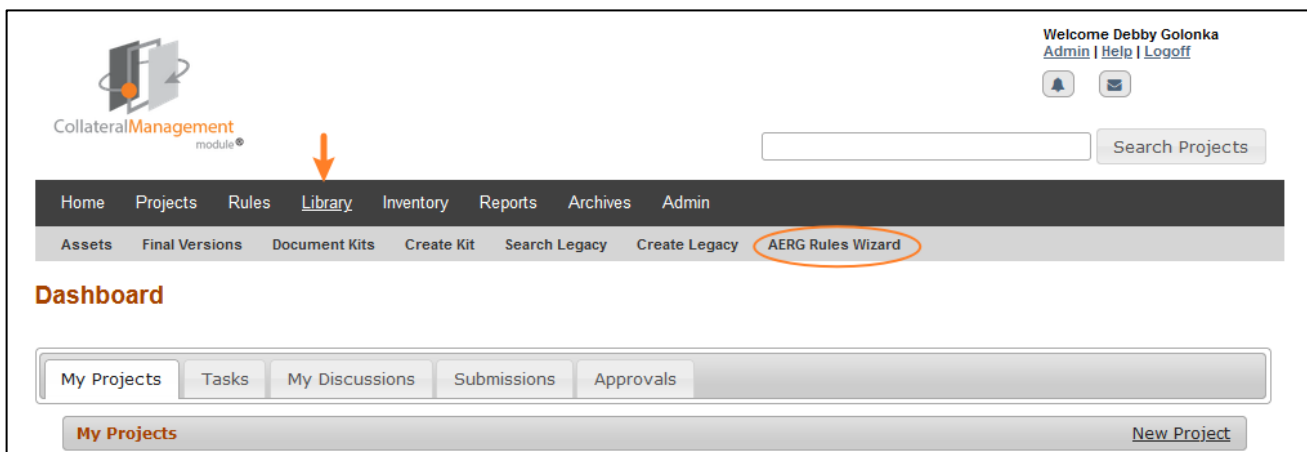
9. Alternatively, click **csAERG** to begin working in the wizard.

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.

AERG Wizard Workflow

There are four main functions of the CodySoft® AERG Wizard workflow:

1. **Create a New Wizard**—Set up a Wizard for the plan year of the CMS model documents you are using and the PBPs that are new, renewing, or crosswalking for that plan year.

2. **Work on an In-Progress Wizard**—Respond to SME-specific questions related to CMS-required model document content. Access the CODY Templates to view questions in-context.

3. **View Status and Responses**— View the status of the Wizard as a whole, and by section area. View the PBPs selected as applicable for a given question.

4. **Export a Rules Grid Asset**—Generate the **ANOC/EOC Rules Grid (AERG)** xls and upload it into the Collateral Management Module to trigger content to appear or be omitted within CODY Templates.

Create a New AERG Wizard

The AERG Wizard has three items to set up:

1. **Plan Data** – A System Administrator at your organization or at CODY should review and update all plan data in CodySoft® TenantAdmin for the given plan year. The CodySoft® AERG Wizard draws essential data from the TenantAdmin module's Plan Data section, including CMS plan type and plan status, in addition to plan IDs.

2. **SME Assignment** – Identify a Subject Matter Expert (SME) for each of the Sections/Areas in the AERG Wizard. Examples include:

Section/Area	Description
A&G	Appeals & Grievances
Claims	Member Reimbursements
Compliance	Privacy Practices/Compliance
DocDev	CodySoft® Document Components
DSNP	Medicaid and DSNP
Enrollment	Enrollment
Finance	Premium Payments/Fees
Group	Employer, EGWP, Union, etc.
MbrComm	Member Communication Distribution
MbrSvcs	Member Services / Plan Contacts / Website
MedMgmt	Medical Management
Pharmacy	Prescription Drug Benefits
Product	Medical Benefits
Provider	Provider Network

3. **New Wizard**—Create a Wizard for the plan year of the CMS model documents you are using and for the PBPs that are new, renewing, or crosswalking for that plan year.

   a) From the Home screen, click "New Wizard".
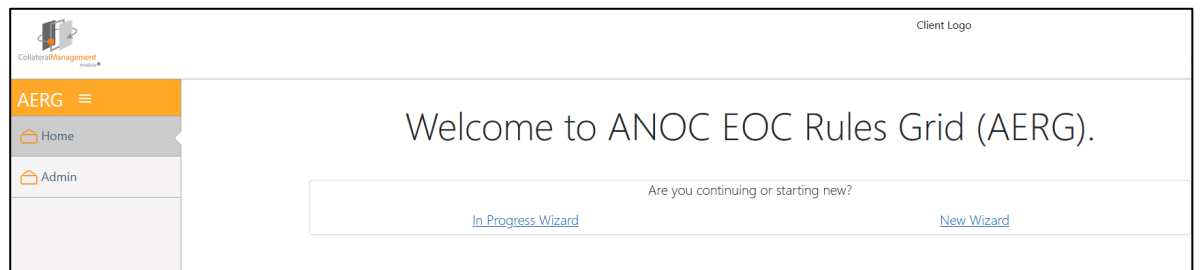
b) Enter four initial data points.

    i. Add a wizard **Name**

    ii. Select the Medicare **Line of Business**

    iii. Add a brief **Description** (such as *Contract Year 20XX AERG*)

    iv. Select the **Plan Year** of the CMS models you are working on

c) Click the checkbox of all the PBPs that are new, renewing, and/or crosswalking for that plan year. To select all PBPs at one time, click the check box for "Select all on screen regardless Plan Type".
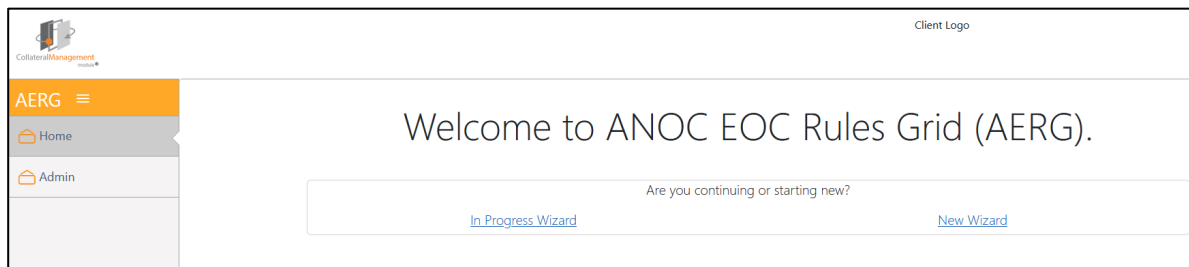
Note: If a PBP you expect to see is not present on the screen, ask your organization's System Administrator to check your Plan Data in the CodySoft® TenantAdmin Module. (For more information, refer to the *Admin Dashboard Quick Reference Guide* within the CodySoft® Knowledge Base.) Or contact your CodySoft® administrator.

d) Click "Submit and Next" to save your selections and continue to the AERG Wizard Sections/Areas screen. You may click "Submit and Close" to save your selections and go to the main In-Progress AERG Wizards screen. In either case, your AERG Wizard is now considered an "In-Progress AERG Wizard".

   i. If you do not want to save the New Wizard, click "Exit to In-Progress Wizard"

e) The **Assigned To** column shows the name of the person assigned to each Section. The Project Manager may click on a blue underlined name to reassign a section to a different SME, as needed.

AERG Wizard Sections/Areas			Exit to InProgress Wizard
Section	Assigned To	Status	Action
A&G	Debby Golonka	Completed	Questions
Claims	Al Valenti	Open Question	Questions

Work on an In-Progress AERG Wizard

1. From the Home screen, click **In-Progress Wizard** to begin or resume work on any In-Progress AERG Wizard.

CollateralManagement module®		Client Logo
AERG ≡	Welcome to ANOC EOC Rules Grid (AERG).	
🏠 Home	Are you continuing or starting new?	
🏠 Admin	In Progress Wizard New Wizard	

2. Click on Sections/Areas at the far right of the Wizard name row to resume work on or view a specific wizard.

In-Progress AERG Wizards				
Name	Created On	Created By	Status	Action
KA3	06/21/2024	Kelly Altmann	In Progress	Sections/Areas
			Items per page: 25 ▼ 1 – 1 of 1 < >	

Note: The **Status** column displays the status for that Wizard.

Answer Questions

The AERG Wizard Sections/Areas screen displays pre-determined subject area Sections, and an Assignee name (SME) per Section.

The AERG Wizard smartly presents SME-specific questions related to CMS-required model document content. While responding to Open questions, users can access the CODY Templates to view questions in-context.

1. Find your name in the **Assigned To** column.

2. Under the **Action** column at far right, click **Questions** to begin reviewing and responding to AERG Wizard questions for the assigned Section.

    Note: The **Status** column displays the status for each Area.

AERG ≡	AERG Wizard Sections/Areas			Exit to In-Progress Wizard
	Section	Assigned To	Status	Action
Home	A&G	Debby Golonka	Open Question	Questions
Admin	Claims	Debby Golonka	Open Question	Questions
	Compliance	Al Valenti	Open Question	Questions
	DocDev	Al Valenti	Open Question	Questions
	DSNP	Debby Golonka	Completed	Questions
	Enrollment	Al Valenti	Open Question	Questions
	Finance	Al Valenti	Open Question	Questions
	Group	Al Valenti	Completed	Questions
	Marketing	Brian Yavorsky	Completed	Questions
	MbrComm	Debby Golonka	Open Question	Questions
	MbrSvcs	Debby Golonka	Open Question	Questions
	Medicaid	Al Valenti	Completed	Questions
	MedMgmt	Debby Golonka	Open Question	Questions
	Operations	Al Valenti	Completed	Questions
	Pharmacy	Debby Golonka	Open Question	Questions

3. The screen defaults to the Open Questions tab. Note the number of Items per page, at bottom right of the screen.
4. To answer a question, click **Response** in the **Action** column.

Example: Open Questions screen for MbrSvcs Area:

AERG Wizard Questions — Exit to Sections/Areas

| | Open | Answered | Auto Answered | Pending |

Open Questions

Rule Name	Question	Action
pharmaddlinfo	All plan types except MA Only: Within the EOC, which PBPs include detail describing additional information about network pharmacies available from Member Services or on the website?	Response
infoupdonline	All plan types: Which PBPs allow members to update member information on-line?	Response
MbrSvcsFaxRow	All plan types: Which PBPs include a fax number within the EOC Member Services contact table?	Response
CDAdiffadd	All plan type: Which PBPs have a different address for accepting expedited organization/coverage determinations for next year?	Response
ANOCSHIPweb	All plan types: Which PBPs will mention in the ANOC that members can learn more about their state-specific SHIP by visiting the SHIP's website?	Response
SHIPnamenostate	All plan types: Which PBPs' state SHIP does not include the name of the state within the SHIP name?	Response
SHIPTTYRow	All plan types: Which PBPs include a TTY number within the EOC SHIP contact table?	Response
QIOTTYRow	All plan types: Which PBPs include a TTY number within the EOC QIO contact table?	Response
Medicaidnamenostate	All plan types: Which PBPs' state Medicaid agency does not include the name of the state within the Medicaid name?	Response
MedicaidTTYRow	All plan types: Which PBPs include a TTY number within the EOC Medicaid contact table?	Response

10
25
50
100

Items per page: 10 ▾   1 – 10 of 14   < >

5. Answer questions by selecting the applicable PBPs for each question. Use the checkboxes in the **AERG Plan Type** column at far left.

- The AERG Wizard displays only the PBPs that apply to the selected question. For example, if there is a new PBP for next year, that PBP will not display on screen for ANOC-only questions.

- For information on how to view the Question and Rule Name in context via **Show References**, see next section, **Template References**.

- Filtering is available within the column headers on the screen. For example, if you input an H Contract Number in the grey "Filter" area under the Contract Number column, the screen will display only the plans with that Contract Number. You can then select each check box on the screen.

  Note: If you filter the data and then click "Select All (including plans hidden by filters)", all PBPs will be selected regardless of your filters.

AERG Wizard Responses   Submit And Close | Submit and Next | Exit to Questions

Question:
All plan types: Which PBPs are in a state that has a PACE plan?

Rule Name:
PACE

Subject Area: Product

Assignee: Al Valenti

[Show References]

☐ Select All (including plans hidden by filters)

AERG Plan Type	Contract Number	Plan ID	Segment ID	Plan Name	Plan Status
Filter	Filter	Filter	Filter	Filter	Filter
☐ All **HMO PD** Plans					
☐ HMO PD	H1234	001	000	Medicare Advantage Gold Plus	Renewal
☐ HMO PD	H1234	002	000	Medicare Advantage Silver	Renewal
☐ All **PPO PD** Plans					
☐ PPO PD	H1234	003	000	Medicare Advantage Bronze	Renewal

6. After you have made your PBP selections, click "**Submit and Next**" to save your response and move to the next Open Question. You may click "**Submit and Close**" to save your response and return to the Sections/Areas screen.

    •   If you want to skip the question to come back to it later, or if you do not want to save your responses, click "**Exit to Questions**" to return to the Open Questions list. The Question will remain an Open Question until you submit a response.

    •   If no PBPs apply to a particular question, do not select any PBPs, and click one of the Submit buttons to save that response.

Template References

To help you make PBP selections, you can view the Question and Rule Name in context.

1. From the AERG Wizard Responses screen, click on "**Show References**" below the Assignee name.

The Template References screen displays. The Rule Name and Question are shown on the right side of screen.

2. In the box at the left side of the screen, click on the name of the EOC or ANOC template you wish to view.

3. View the model content, including CMS Model instructions and/or Cody Consulting Group **[CCG:]** notes, in the area(s) of the document to which the Rule Name applies.

   • The Search box automatically populates with the prefix "AERG" and the Rule Name, and the first instance of that Rule Name is shaded in grey in the Template image.

   • The first instance of the Rule Name is contained within a pink "IF" statement, starting with [[IF: RuleId=.

   • Rule Names work in pairs in the Templates. That is, each rule has a pink "IF" statement and "ENDIF" statement that surrounds the content applicable to that Rule Name. The "ENDIF:" statement starts with [[ENDIF: RuleId=.
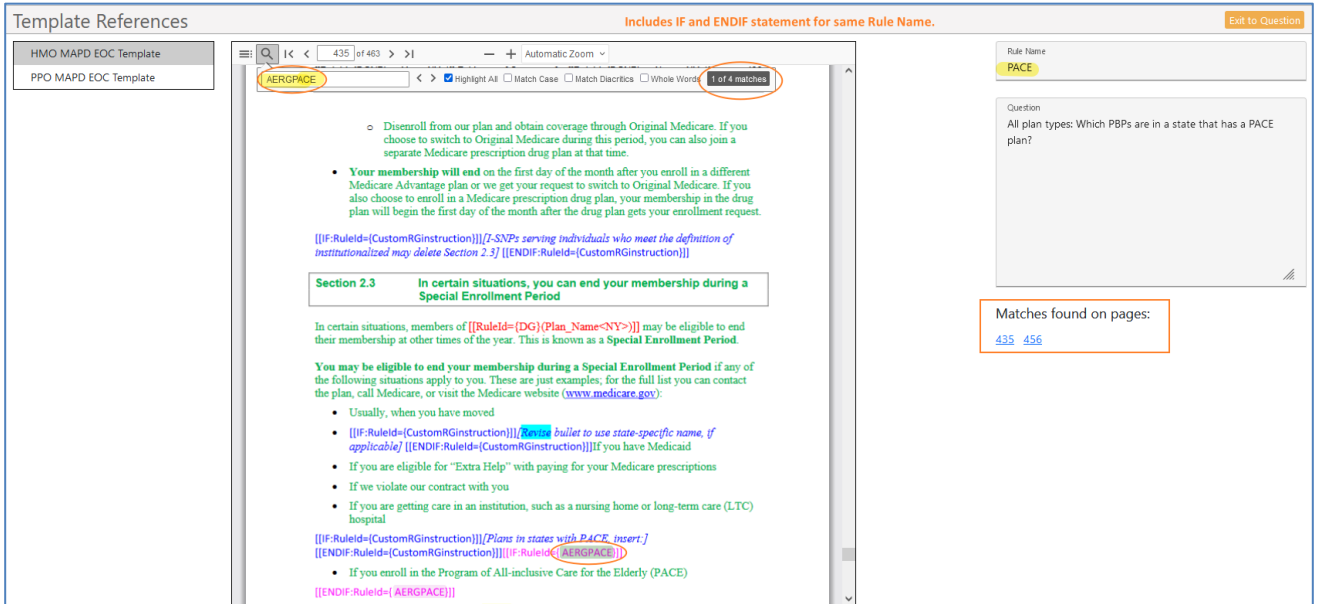
4. Click the ❯ icon to the right of the Rule Name in the search box to move to the next instance of that Rule Name in the Cody Template.
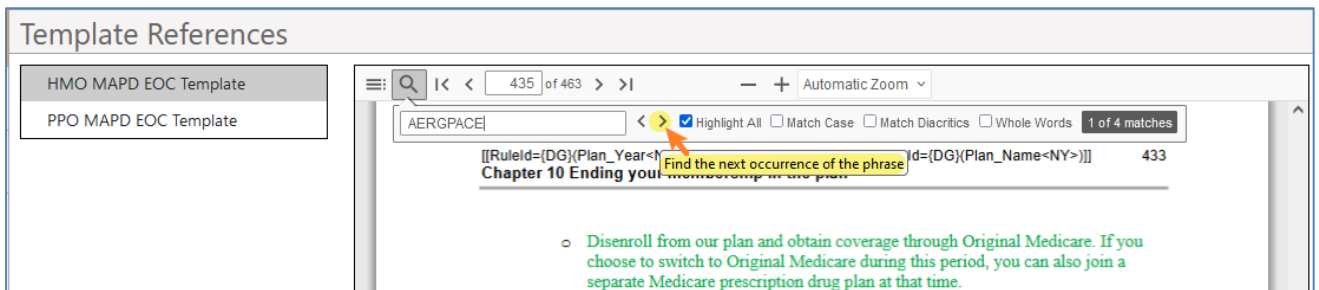
a) You can also click the Page Numbers shown in the "**Matches found on pages:**" area of the screen.
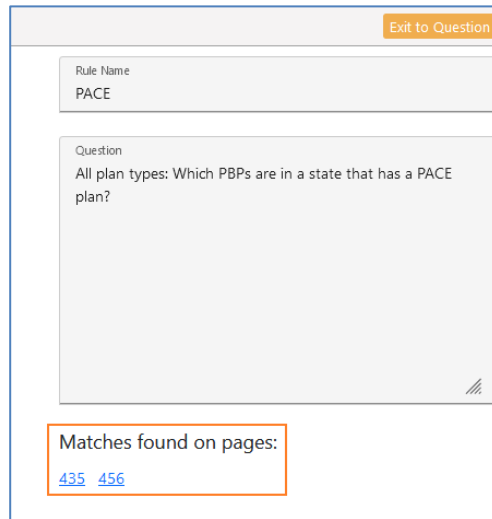
b) Click the greater than key to find the Rule Name on that page; it is highlighted in gray shading.
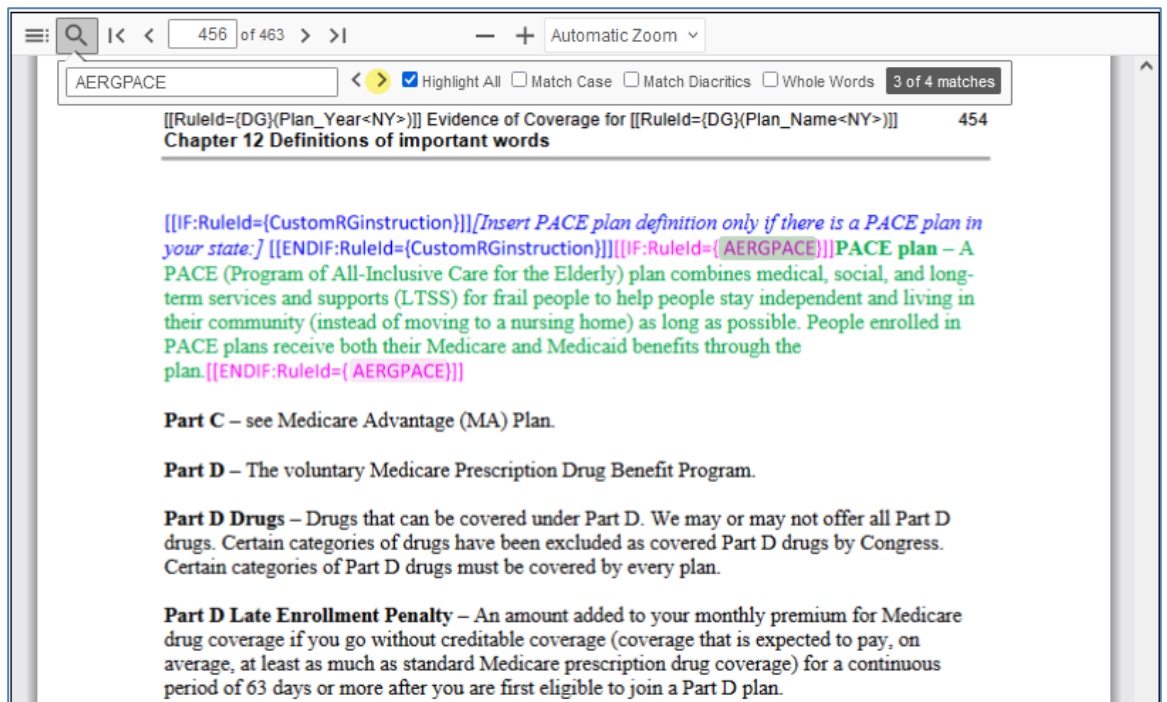
Refer to *CodySoft® Templates Reference and User Guide* in the CodySoft® Knowledge Base for information on the text color coding and RuleId types, as needed.

Status and Automations

The AERG Wizard dynamically streamlines the response process while Subject Matter Experts (Area assignees) input their responses to questions.

The AERG Wizard:

1. Programmatically auto-answers a question when it receives the response to a different question. This helps reduce the total number of questions presented to the users.
2. Programmatically ignores non-applicable questions to help reduce the total number of questions presented to the users.
3. Tracks the status of responses within each Area.
4. Displays the Wizard status by Area.

Status of responses per Area

Each of the four status tabs on the **AERG Wizard Questions** screen systematically displays all the questions for a given Area in "real time".
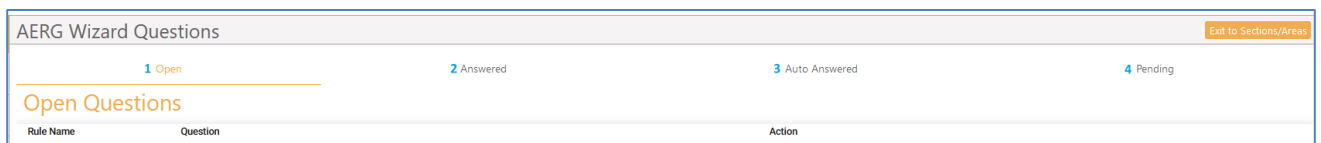
1. **Open** = If one or more questions is present on this tab, a response is required by the person assigned to that Section.

   a) Select PBPs that are applicable for the question.

   b) If needed later, you can view and/or edit the PBPs that have been selected.

2. **Answered** = If one or more questions is present on this tab, at least one Open question was answered. You can view and/or edit the PBPs that have been selected by clicking Response.
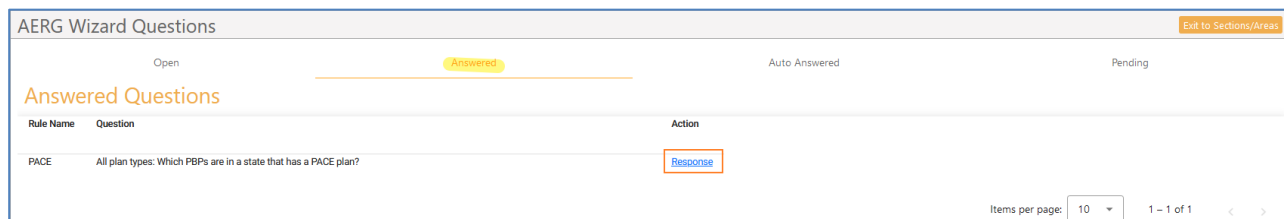
3. **Auto Answered** = This tab is populated with questions that have been automatically answered by the AERG Wizard. These include questions that are dependent on responses to select answered questions as well as questions for the In-Progress Wizard's non-applicable plan types.

- The **Chosen Plan** column displays the Plan Names of the selected PBPs. If no Plan Names are present, no PBPs were selected for the response.

AERG Wizard Questions			
Open		Answered	Auto Answered

Auto Answered Questions

Rule Name	Question	Chosen Plan	
nopremium	All plan types: Which PBPs do NOT have a plan premium for next year? Note: If PBP is crosswalking to an applicable PBP next year, select both the crosswalking PBP and the renewing or new PBP it is crosswalking to.	Medicare Advantage Bronze	One plan met critera.
MAPDorMApremium	PFFS only: Which PBPs are either an MAPD plan or an MA only plan with a plan premium?		No plans met criteria.

4. **Pending** = If one or more questions are present on this tab, it is because it relies on a response to a different question or questions before it can be addressed. The Rule Name of the question needing to be answered is shown in the **Dependent to Rule** column. After that rule dependency question is answered, the Question in the Pending tab will move either to the Open tab or to the Auto Answered tab.

AERG Wizard Questions			Exit to Sections/Areas
Open	Answered	Auto Answered	Pending

Pending Questions

Rule Name	Question	Dependent to Rule	
combineplan	All plan types except MA Only and PDP: Which PBPs are combining (or consolidating) a plan into another plan for next year? Note: MA Only and PDP models exclude variability for this content.	planconsolORtrans	
transitionplan	All plan types except MA Only and PDP: Which PBPs are transitioning a DSNP look-alike plan to another plan for next year? Note: MA Only and PDP models exclude variability for this content.	planconsolORtrans	
premtblreg	All plan types: For plans with a plan premium for next year, which PBPs will include the premium amount by region (rather than by service area) within a list or table in chapter 1 of the EOC?	preminsert	

Due to the dynamic nature of the AERG Wizard, it is helpful to check the overall status of the Wizard by looking at the AERG Wizard **Sections/Areas** screen. See Status of In-Progress Wizard for more information. For example, the absence of questions on the Open tab for one Section does not necessarily mean the Section's set of questions is completed.

The AERG Wizard automatically opens a dependency-required question after the dependent question receives a response.

The AERG Wizard reopens a question if a dependent question's response is edited.

In addition, the AERG Wizard will automatically edit the response to Auto-Answered questions if a dependent question's response changes.

Status of In-Progress Wizard

The **AERG Wizard Sections/Areas** screen shows one of the following statuses per each Section. It is important to note that the Status may update at any given time.

1. **Open Question** – At least one question requires a response from the person assigned to that Section.

2. **Pending Auto-answers** – At least one question is pending a response from a person assigned to a different Section. There are no Open Questions currently.

3. **In Progress** – At least one question is Pending a response and at least one question has been answered.

4. **Completed** – All responses have been completed, or the Section had no questions to be assigned.

AERG Wizard Sections/Areas			Back to InProgress Wizard
Section	**Assigned To**	**Status**	**Action**
A&G	Nick Scalfone	Completed	Questions
Claims	Al Valenti	Open Question	Questions
Compliance	Al Valenti	Open Question	Questions
DocDev	Al Valenti	Pending Auto-answers	Questions
DSNP	Andrew Casey	Completed	Questions
Enrollment	Al Valenti	Open Question	Questions
Finance	Al Valenti	Open Question	Questions
Group	Al Valenti	Completed	Questions

Rules Grid Asset: AERG

You can generate an **ANOC/EOC Rules Grid (AERG)** xls to be used in the CodySoft® Collateral Management Module®.

1. Go to your In-Progress Wizard.

2. Check Status for each Section. If all Status rows say "Completed", then your Grid output will generate the results from all SMEs. If some Status rows do not say "Completed", you can still export an xls, but the output is subject to change after all Sections/Areas are completed.

   The Project Manager can go into an In-Progress Wizard to edit responses and/or generate an Excel Grid at any time throughout the AERG workflow and document development work.

3. To produce an Excel Grid, click **Publish to CM** or **Export to Excel**.

AERG Wizard Sections/Areas			Back to In-Progress Wizard
Section	**Assigned To**	**Status**	**Action**
A&G	Nick Scalfone	Completed	Questions
Claims	Al Valenti	Completed	Questions
Compliance	Al Valenti	Completed	Questions
DocDev	Al Valenti	Completed	Questions
DSNP	Andrew Casey	Completed	Questions
Enrollment	Al Valenti	Completed	Questions
Finance	Al Valenti	Completed	Questions
Group	Al Valenti	Completed	Questions
Marketing	Brian Yavorsky	Completed	Questions
MbrComm	Cory Belden	Completed	Questions
MbrSvcs	Devang Shah	Completed	Questions
Medicaid	Al Valenti	Completed	Questions
MedMgmt	Kelly Altmann	Completed	Questions
Operations	Al Valenti	Completed	Questions
Pharmacy	Nick Scalfone	Completed	Questions
Product	Al Valenti	Completed	Questions
Provider	Al Valenti	Completed	Questions
Website	Nick Scalfone	Completed	Questions

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Finish   Publish to CM   Export to Excel

Refer to the *CodySoft® Templates Reference and User Guide* in the [CodySoft® Knowledge Base](#) for information on how this auto-generated rules grid is utilized along with other rules grids in the CodySoft® Collateral Management Module®.

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:
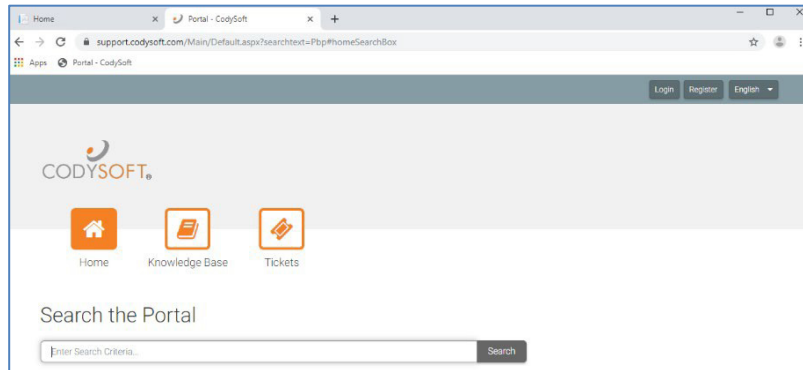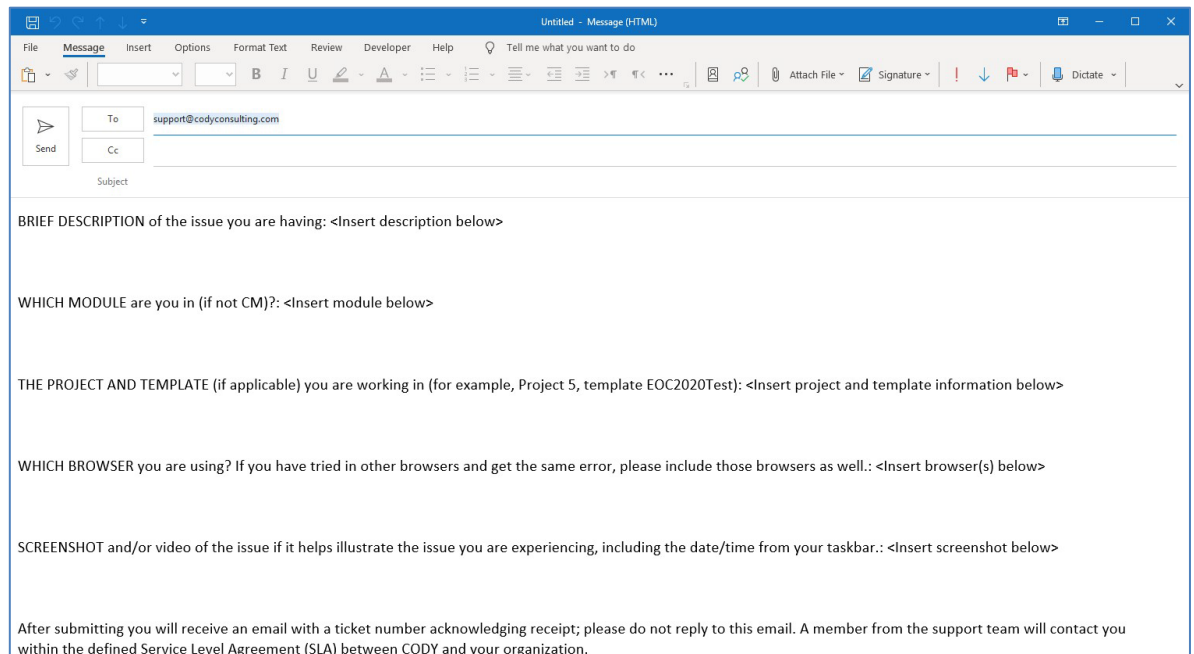

2. From the Support Portal home screen, you have three choices:
   a. Knowledge Base
   b. Tickets
   c. Search the Portal

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 CodySoft® modules, including the Collateral Management Module®.

Open a Ticket

1. Click **Tickets** to enter a new support ticket:

2. Click **Start Ticket**. An email opens addressed to Cody Support:

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