



## CodySoft® August 22<sup>nd</sup> 2024 release notes

### HPMS/CCM Module:

1. Reports will no longer indicate True/False they will be Yes/No

A	B	C	D	E	F	G	H	I
Id	Title	To	From	Release Date	Business Applicable	Description	ActionType	CorrespondenceType
correspondences/1986-A	Sanction Letter	Plan	CMS	8/14/2024 10:00:00 PM	Yes	test	Actionable	CMS Sanction Letter
correspondences/1985-A	Client Audit	Plan	Client	8/15/2024 10:00:00 PM	Yes	test	Actionable	CMS Audit Notice
correspondences/1953-A	HPMS Notification	Plan	CMS	7/31/2024 10:00:00 PM	Yes	test	Actionable	Client Correspondence
correspondences/1921-A	Testing Dashboard	Plan	Test	8/1/2024 10:00:00 PM	Yes	test	Actionable	CMS Audit Notice
correspondences/1889-A	CMS Timeliness	Plan	CMS	7/30/2024 10:00:00 PM	Yes	test	Actionable	Client Correspondence
correspondences/1858-A	Test with revert	Mark Lew	Javlee Green	7/30/2024 9:00:00 PM	Yes	Test	Actionable	CMS Sanction Letter

2. The “Regulatory Entity” field name has been changed to “Entity” in the Correspondence module. The Admin screen has also been updated to “Entities” instead of “Regulatory Entities”

Add Correspondence Add Back

**Correspondence Details**

Correspondence Details | Attachments

Correspondence Owner:  Lines of Business:

Secondary Correspondence Owner:  Plan Contract No:

Due Date:  Plan Type:

Priority Level:  Media Type:

**Entity**:  Business Applicable:

Classification Categories:

Admin > Manage Items

Audit Elements | **Entities** | Classification Categories | Correspondence Types

Audit Elements Add Item

Search

3. On the dashboard the “Memo Owner” field name has now been changed to “Owner”

Owner	Draft	Open	Business Complete	Closed
Attila Kozma	68	1	0	0
Cory Belden	0	1	0	0

4. The “Action Due Date” field has been changed to “Internal Due Date”

Add Action Add Back

**General Information**

Action Title:  Internal Due Date:

Business Owner:  External Response Required:  Yes  No

Comments/Instructions:

Required Action:

5. The “CMS Response Required” field has been changed to “External Response Required”

6. The “CMS Response Due Date” field has been changed to “External Response Due Date”

Add Action Add Back

**General Information**

Action Title:  Internal Due Date:

Business Owner:  External Response Required:  Yes  No



External Response Due Date:


Comments/Instructions:


Required Action:

- 7. The Action Response notification emails have been updated to reflect External Response Due Date

### Action Response Due Date Approaching

 server@codysoft.net  
To  Michelle Larson

Start your reply all with: [What is the message?](#) [Confirmed, thank you.](#) [Thank you for the reminder.](#)  Feedback



**An action attached to your Memo has an upcoming External Response Date.**

**Action Details:**

Action #: 1700-A  
Title: Call Center Q2 Report  
Due Date: Thursday, August 22, 2024  
Link to Action: [OPEN](#)

**Memo Details:**


Memo #: 40097-A  
Memo Name: Call Center  
Link to Memo: [OPEN](#)

- 8. Priority Level and Business Applicable no longer have default selections in the Correspondence Module

Add Correspondence [Add](#) [Back](#)

**Correspondence Details** ^

[Correspondence Details](#) [Attachments](#)

Correspondence Owner <input type="text" value="Select an Option"/>	Lines of Business <input type="text" value="Select all / Deselect all"/> <input type="text" value="Select Some Options"/>
Secondary Correspondence Owner <input type="text" value="Select an Option"/>	Plan Contract No <input type="text" value="Select all / Deselect all"/> <input type="text" value="Select Some Options"/>
Due Date <input type="text" value="Due Date"/> 	Plan Type <input type="text" value="Select all / Deselect all"/> <input type="text" value="Select Some Options"/>
<span style="border: 1px solid red; padding: 2px;">Priority Level <input type="text" value="Select an Option"/></span>	Media Type <input type="text" value="Select all / Deselect all"/> <input type="text" value="Select Some Options"/>
Entity <input type="text" value="Select an Option"/>	<span style="border: 1px solid red; padding: 2px;">Business Applicable <input type="checkbox"/></span>
Classification Categories <input type="text" value="Select all / Deselect all"/> <input type="text" value="Select Some Options"/>	