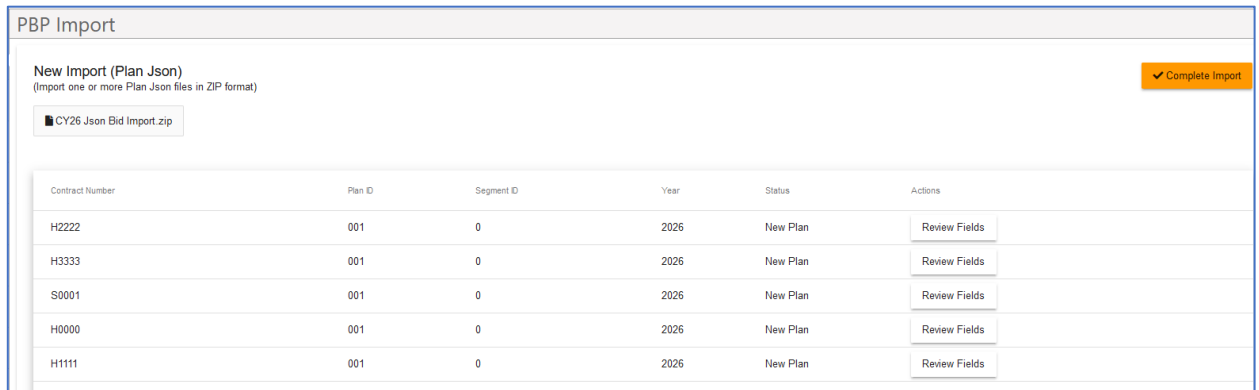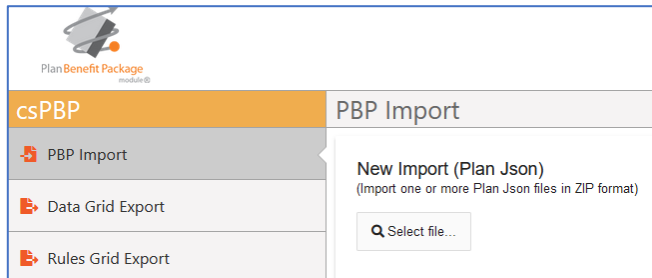# CodySoft® January 8th 2025 release notes
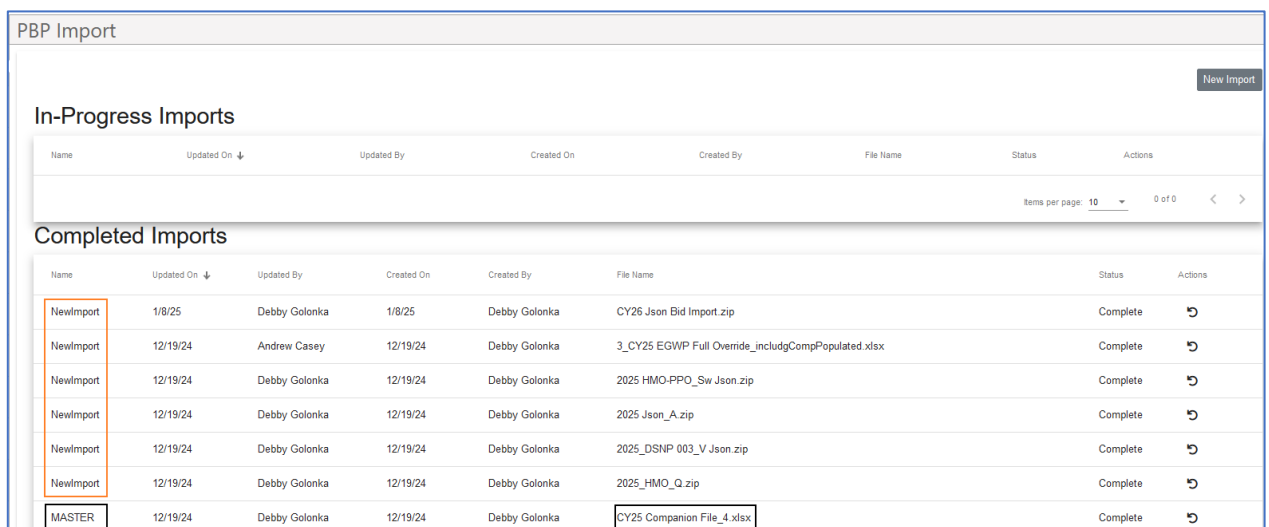
PBP Module:

1. **PBP Import** process has been streamlined.
   a) **New Import:** After selecting a file, the PBP Import screen **displays the PBP list along with the ability to Review Fields and/or Complete Import**. Previously, the system prompted the user to Begin Import and Name the Import before the Review Fields/Complete Import buttons displayed.

   b) **Complete Imports:** The import **Name** is **automatically assigned**
      i. Json imports and EGWP Full Override imports are named "NewImport"
      ii. Companion Data imports are named "MASTER"

2. **Companion Data Imports** no longer require a data schema, and file type for import is now .XLSX instead of ZIP file.

3. **More detailed error messages** during the Import process.

4. **New columns** for **Plan Type, SNP Type,** and **Part D** have been added to Manage PBPs, Data Grid Export, and Rules Grid Export screens. This data is pulled directly from the Plan Data in CodySoft® TenantAdmin module.

Contract Number	Plan ID	Segment ID	Year	Plan Type	SNP Type	Part D?	Updated On ↓	Updated By	Created On	Created By
Filter	8|	Filter	Filter	Filter	Filter			Filter		Filter

☐ Select all on screen regardless of Plan Type

Filter Plan Types ▾

☐ All visible Plans of type **HMOPOS**

☐ H1234	801	0	2025	HMO-POS - MAPD		Yes	12/19/24	Andrew Casey	12/19/24	Debby Golonka
☐ H1526	008	0	2025	HMO-POS - C-SNP	C-SNP	Yes	12/19/24	Debby Golonka	12/16/24	Nick Scalfone
☐ H2320	028	1	2025	PPO - HMO-POS		Yes	12/19/24	Debby Golonka	12/16/24	Nick Scalfone

☐ All visible Plans of type **Local PPO**

| ☐ H1234 | 802-Value | 0 | 2025 | PPO - MA-Only | | No | 12/19/24 | Andrew Casey | 12/19/24 | Debby Golonka |

5. **Manage PBPs** screen now displays **Import Type** of "EGWP" for Plans imported in a Full Override file.

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	Plan Type	SNP Type	Part D?	Updated On ↓	Updated By	Created On	Created By	Import Type
	Filter	8|	Filter	Filter	Filter	Filter			Filter		Filter	

Filter Plan Types ▾

☐ All visible Plans of type **HMOPOS**

☐ ⊞ 📋	H1234	801	0	2025	HMO-POS - MAPD		Yes	12/19/24	Andrew Casey	12/19/24	Debby Golonka	EGWP
☐ ⊞ 📋	H1234	008	0	2025	HMO-POS - C-SNP	C-SNP	Yes	12/19/24	Debby Golonka	12/16/24	Nick Scalfone	Individual
☐ ⊞ 📋	H1234	028	1	2025	PPO - HMO-POS		Yes	12/19/24	Debby Golonka	12/16/24	Nick Scalfone	Individual

☐ All visible Plans of type **Local PPO**

| ☐ ⊞ 📋 | H1234 | 802-Value | 0 | 2025 | PPO - MA-Only | | No | 12/19/24 | Andrew Casey | 12/19/24 | Debby Golonka | EGWP |