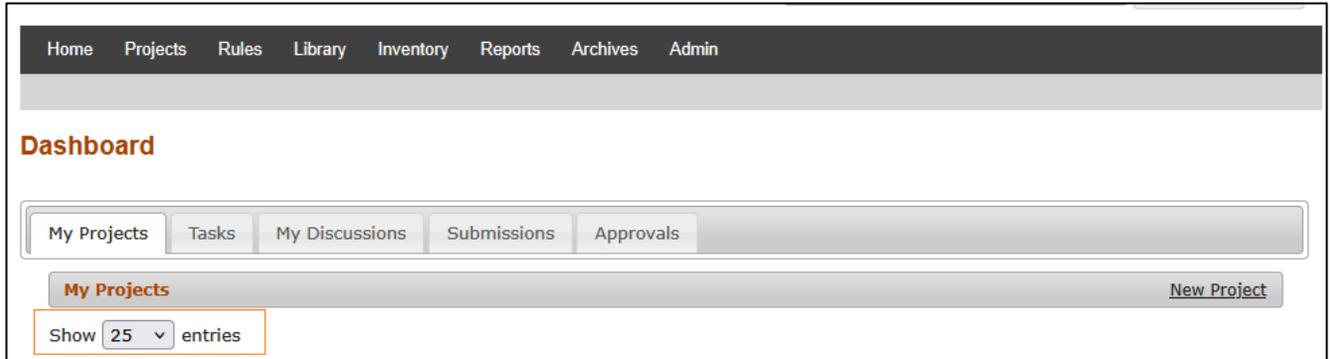


CodySoft® April 24th, 2025 release notes

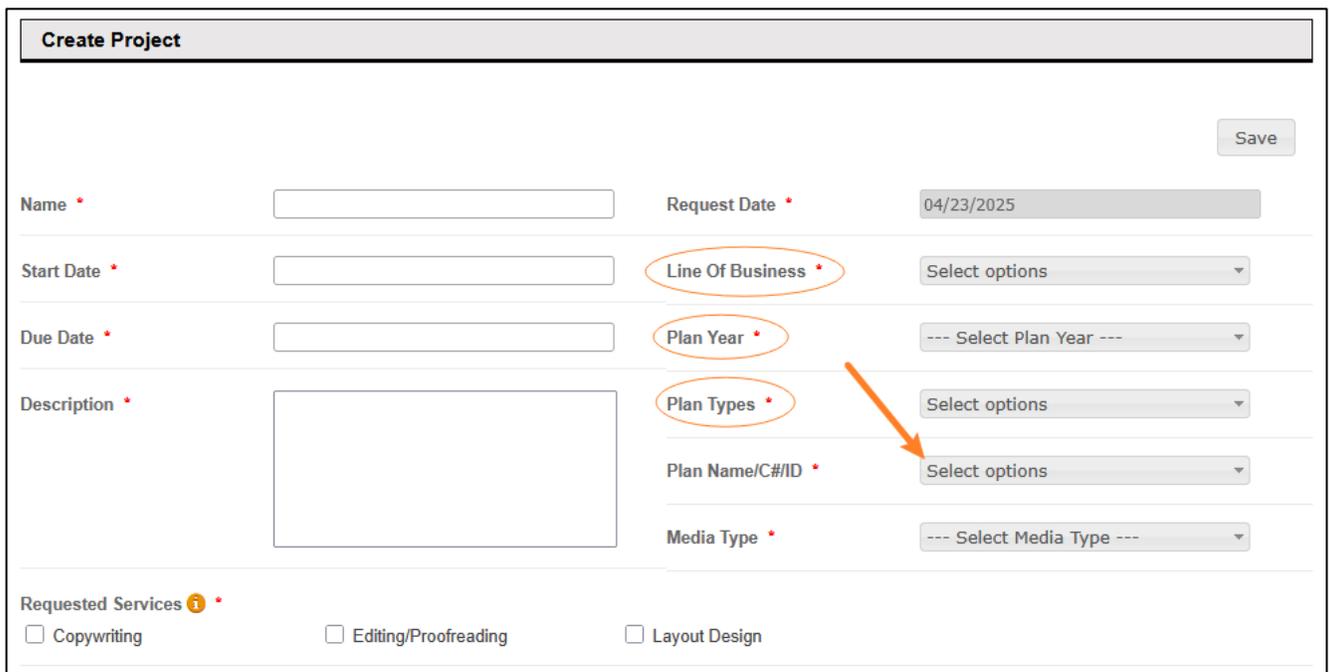
Collateral Management Module:

1. The **My Projects** screen now displays **25 entries** on one page as a default



2. Additional **Filters** automatically narrow down the selection of **Plan Names** to include in a Project
 - a) The list of **Plans** in the Plan Name/C#ID box will **automatically filter** based on the combined selections made in the **Line of Business, Plan Year, and Plan Types** boxes.

New Project Screen

A screenshot of the 'Create Project' form. The form has a title bar 'Create Project' and a 'Save' button. It contains several input fields: 'Name', 'Request Date' (with value '04/23/2025'), 'Start Date', 'Due Date', 'Description', 'Plan Name/C#ID', and 'Media Type'. There are also three dropdown menus: 'Line Of Business', 'Plan Year', and 'Plan Types'. The 'Line Of Business', 'Plan Year', and 'Plan Types' dropdowns are circled in orange, and an orange arrow points from the 'Plan Types' dropdown to the 'Plan Name/C#ID' dropdown. At the bottom, there is a section for 'Requested Services' with checkboxes for 'Copywriting', 'Editing/Proofreading', and 'Layout Design'.

Edit Existing Project Screen

Details | Tasks | Discussions | Rules | Templates | Versions | Attachments | Compliance

Project Overview | Project Services/Details | Printing and Distribution | Requestor Info

Document Type Model Non-Model

Required / Optional Required Optional

Job Number 294

Name * 2025 EOC Project

PR Number 00

Description * Plan Year 2025 Evidence of Coverage

MCE Project

Start Date * 04/01/2025

Budget Estimate

Budget Actual

Regulatory Project Type --- Select Regulatory Proj...

Media Type * EOC

Line Of Business * Medicare, Medicare Advan...

MAPD

Plan Types * MAPD

Sub Plan Types Select options

Plan Year * 2025

Medicare Advantage Gold - H1234 - 001, Medicare Advantage Silver - H1234 - 002, Medicare Advantage Bronze - H1234 - 003

Plan Name / C # / ID * Select options

