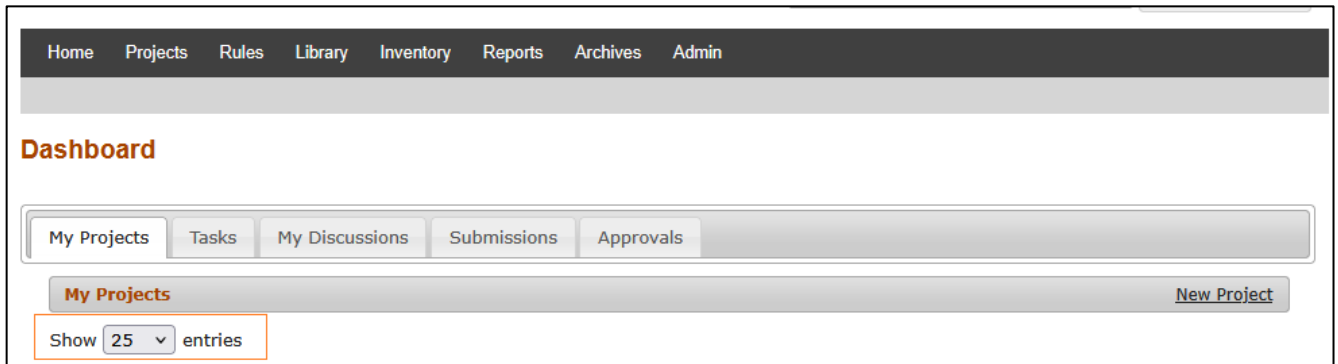


CodySoft® April 24th, 2025 release notes

Collateral Management Module:

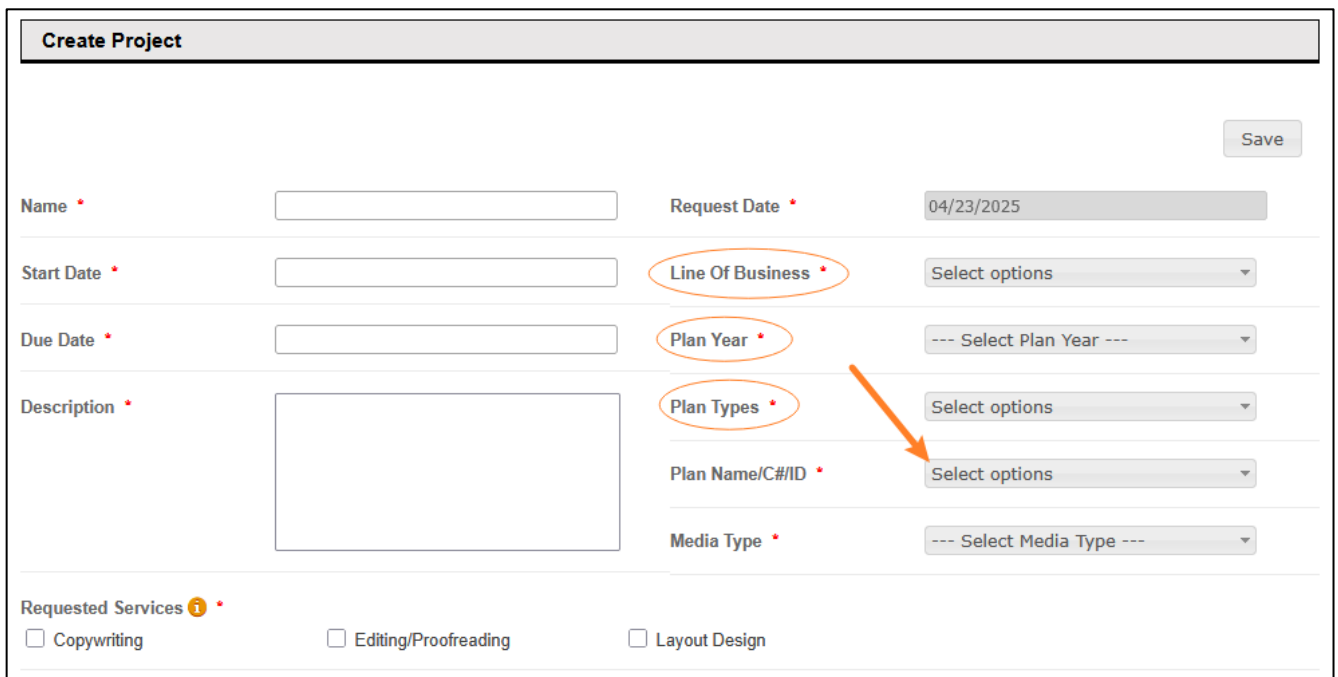
1. The **My Projects** screen now displays **25 entries** on one page as a default



The screenshot shows the 'My Projects' dashboard. At the top is a navigation bar with links: Home, Projects, Rules, Library, Inventory, Reports, Archives, and Admin. Below this is a 'Dashboard' section with tabs: My Projects, Tasks, My Discussions, Submissions, and Approvals. The 'My Projects' tab is active. Below the tabs is a 'My Projects' header with a 'New Project' link on the right. At the bottom left, there is a 'Show 25 entries' dropdown menu, which is highlighted with an orange box.

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



The screenshot shows the 'Create Project' form. It has a 'Save' button at the top right. The form fields are: Name (text input), Request Date (date input, showing 04/23/2025), Start Date (text input), Line Of Business (dropdown menu, highlighted with an orange circle), Due Date (text input), Plan Year (dropdown menu, highlighted with an orange circle), Description (text area), Plan Types (dropdown menu, highlighted with an orange circle), Plan Name/C#ID (dropdown menu, highlighted with an orange circle and an orange arrow pointing to it), and Media Type (dropdown menu, showing --- Select Media Type ---). At the bottom, there is a 'Requested Services' section with three checkboxes: Copywriting, Editing/Proofreading, and Layout Design.

Edit Existing Project Screen

DetailsTasksDiscussionsRulesTemplatesVersionsAttachmentsCompliance

Project OverviewProject Services/DetailsPrinting and DistributionRequestor 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