





New deployment items in the HPMS/CCM Module:


1. Admin Settings

A new setting added to turn off the Action Approval step. When checked, Actions will not be sent to the Compliance owner to approve prior to setting Tasks.



Compliance
Correspondence
module®





Hannah LaMere
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Dashboard Help Logout

csHPMS/CCM

Admin > Settings

Dashboard

Reporting

Archives

Regulatory Analyzer

Admin

Items

Settings

Workflow Settings

Dissemination Settings

Save

Reminder Settings

Send notification when current date approaches the Due Date ☒

Number of Notices *

Number of Days Before Due Date to Issue First Notice *

Send notification when current date is greater than the Due Date (Past Due) ☒

Number of Notices *

Number of Days After Due Date to Issue First Notice *

General Settings

Release Date Required (CCM only) ☐

Action Approval Required ☐

2. Ability to Copy existing Correspondence

Users have the option to Copy a Correspondence. This will copy over the filled data fields and assign a new Correspondence number. The fields can be edited as needed for the new Correspondence.

The screenshot shows the 'Draft Correspondence #961-A' form. The left sidebar contains navigation links: Dashboard, Reporting, Archives, Regulatory Analyzer, and Admin. The top header includes the CodySoft logo, user information (Hannah LaMere), and a notification bell with 14 alerts. A red arrow points to the 'Copy' button in the top right corner. The form fields are as follows:

General Information			
Correspondence Title *	August 22	Release Date	08/19/2025
Correspondence Type	CMS Audit Notice	Action Type *	Actionable
Compliance or FWA? *	Select an Option	To *	Client
		From *	Plan
Description *			
test			

3. Drop down field to select Compliance, FWA or Both

When creating a new Correspondence, users can indicate if the item is related to Compliance, FWA or Both. This data is needed for the Compliance Oversight Activities (COA) log and universe. This is a reportable field.

The screenshot shows the 'Add Correspondence' form. The left sidebar contains navigation links: Dashboard, Reporting, Archives, Regulatory Analyzer, and Admin. The top header includes the CodySoft logo, user information (Hannah LaMere), and a notification bell with 14 alerts. The form fields are as follows:

General Information			
Correspondence Title *	Correspondence Title	Release Date	Release Date
Correspondence Type	State Insurance Regulatory Corres...	Action Type *	Select an Option
Compliance or FWA? *	Select an Option	To *	To
		From *	From
Description *			
Description			

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csHPMS/CCM
Add Correspondence
Add Back

Dashboard
Reporting
Archives
Regulatory Analyzer
Admin

General Information

Correspondence Title *

Correspondence Title

Release Date

Release Date

Correspondence Type

State Insurance Regulatory Corres... X

Action Type *

Select an Option

Compliance or FWA? *

Select an Option

To *

To

From *

From

Description *

Description

4. Drag and Drop Output Fields on Report Builder

When creating a report in the Report Builder, users can Add individual items from the Output Fields (left panel) by selecting the item(s) then click Add. Items will move to the right panel. If an Output Field was selected but not needed, users can Drag the field from the right panel to remove the item(s).

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csHPMS/CCM
Report Builder

Dashboard
Reporting
Archives
Regulatory Analyzer
Admin

HPMS Reports
CCM Reports

Create New Report

Report Settings:

Select Output Fields:

Correspondence
Action Type
Activity Frequency
Activity Rationale
Activity Results Shared Date
Activity Results Shared
Activity Results Shared With
Audit Elements
Business Applicable
CAP Required
Classification Categories
Closed On
Compliance Committee Date
Compliance or FWA
Compliance Score
Results
Contract Numbers
Correspondence Owner
Correspondence Type
Created By
Created On

Add
Add All
Remove All

No fields selected
Select fields from the left panel and click "Add"
Drag fields outside this area to remove them

Next