

## CodySoft February 13<sup>th</sup> 2020 release notes:

### Collateral Management Module:

1. Introduction of the Rules Wizard, which allows users to create an entire set of new rules automatically from a Published CodySoft Rules Grid.
  - a. The Rules Wizard presents a simple way for users to bulk create hundreds of new rules, optionally including a prefix and/or suffix for each in just a few clicks.

The screenshot shows the 'Rules Wizard' interface. At the top is a navigation bar with links: Home, Projects, Rules, Library, Inventory, Reports, Archives, Search Regulatory Rules, and Admin. Below the navigation bar, the title 'Rules Wizard' is displayed. On the right side, there is a 'Preview' button. The main form area contains several input fields: 'Line Of Business' with a dropdown menu showing 'Select options', 'Prefix' with a text input field, 'Suffix' with a text input field, 'Property Marker' with a text input field, and 'Rules Grid' with a dropdown menu showing 'None Selected'. Below the form, there is a maintenance notice: 'We will be performing maintenance on the CodySoft servers every morning at 4 AM ET. If you are working at that time, please save your work and exit the application. Maintenance will take 10 minutes or less. Thank you.' At the bottom, there is a footer with links: Home, Projects, Rules, Library, Inventory, Reports, Admin, Help, and a copyright notice: 'This document contains confidential information that is for the proprietary use by Cody Consulting only and cannot be reproduced or used without the sole permission of Cody Consulting. © 2020 Cody Consulting Group, Inc.'

- b. Validations ensure only new unique rules are created

The screenshot shows the 'Rules Wizard Preview' dialog box. The title bar reads 'Rules Wizard Preview: Rules: 167 - Duplicates: 2 - OK: 165'. The dialog contains a table with the following columns: 'Created Rule Name', 'Rule Description', 'Rule Attribute', and 'Status'. The table lists 167 rules, with 2 marked as 'DUPLICATE' and 165 marked as 'OK'. The rules are as follows:

Created Rule Name	Rule Description	Rule Attribute	Status
acupuncture	if plan has acupuncture as a supplemental benefit	acupuncture	DUPLICATE
annualphysical	if plan has annual physical exam as a benefit	annualphysical	DUPLICATE
NJ	if plan is in the state of New Jersey	NJ	OK
TX	If plan is in the state of Texas	TX	OK
serviceAreaChange	If the plan has a service area change	serviceAreaChange	OK
ANOCmeddeductible	if plan has medical deductible in current year AND/OR will have a medical deductible next year	ANOCmeddeductible	OK
meddeductible	if plan has a deductible for medical benefits (can be plan level, service category or both types of deductible)	meddeductible	OK
MoopChange	If plan does have a year-to-year change for the plan's MOOP	MoopChange	OK

At the bottom of the dialog, there are two buttons: 'Create ALL (165) 'OK' Rules' and 'Cancel'.

## 2. Bulk change of Version Status

- When selecting one or more version you are now able to change version status on all selected Versions

▼ Active Versions

Change document(s) status to:

Download selected document(s)

Cancelled

Original Format

Draft

Approved

Complete

Cancelled

	Version Number	Contract Number	Template#/RevDate /Version# View	Created By	Created On	Status			
<input type="checkbox"/>	01_HMO_Medicare Advantage Gold_ANO	001	H1234	19_02032020_1	Alphonse Valenti	02/03/2020	Draft		
<input type="checkbox"/>	Medicare_2020_H1234_0	001	H1234	2_01012020_100	Gaurav Singhal	01/01/2020	Draft		
<input type="checkbox"/>	01_HMO_Medicare Advantage Gold_ANO	001	H1234	2_01012020_100	Gaurav Singhal	01/01/2020	Draft		
<input type="checkbox"/>	Medicare_2020_H1234_0	002	H1234	2_01012020_101	Gaurav Singhal	01/01/2020	Draft		
<input type="checkbox"/>	02_HMO_Medicare Advantage Silver_ANO	002	H1234	2_01012020_101	Gaurav Singhal	01/01/2020	Draft		
<input checked="" type="checkbox"/>	Medicare_2020_H1234_0	003	H1234	2_01012020_102	Gaurav Singhal	01/01/2020	Draft		
<input checked="" type="checkbox"/>	03_HMO_Medicare Advantage Silver_ANO	003	H1234	2_01012020_102	Gaurav Singhal	01/01/2020	Draft		
<input checked="" type="checkbox"/>	Medicare_2020_H1234_0	001	H1234	2_01012020_103	Gaurav Singhal	01/01/2020	Draft		
<input checked="" type="checkbox"/>	01_HMO_Medicare Advantage Gold_ANO	001	H1234	2_01012020_103	Gaurav Singhal	01/01/2020	Draft		

## HPMS Memo Module:

### 1. Introduction of Secondary Memo and Correspondence Owner assignment

- The assigned Secondary Owner can do everything the Primary Owner can do to the Memo or Correspondence they are assigned to, in addition to the associated Actions and Tasks

Memo Details

Memo Details

Actions

Attachments

Related Memos/Correspondences

Primary Memo Owner

Brian Yavorsky

Secondary Memo Owner

Select an Option

- Users in the Admin role can now change the Primary Memo or Correspondence Owner, and Secondary Memo or Correspondence Owner without being assigned to those records

3. Memos and correspondences visible to only Compliance roles, and assigned Action Owners
- a. Below represents the view of a user in the Action Owner, and Task Owner roles. Only Memos and Tasks related to their assigned Actions are visible

Dashboard

Actions

My Tasks

Search

Parent Type	Parent #	Action # ▼
Parent Type ▼	Parent # ▼	Action # ▼
memos	10050	5249
memos	9985	5219
correspondences	609	4065

- b. Below represents the view of a user in the Task Owner role. Only Actions related to their assigned Tasks are visible

Dashboard	
My Tasks	
Search	
Task Id	
Task Id ▼	
HPMS.memos.9985.5219	
HPMS.memos.9985.5220	