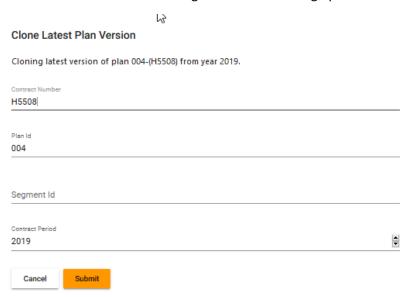
CodySoft February 27th 2020 release notes:

Collateral Management Module:

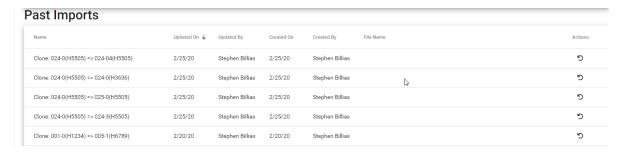
- 1. Automated removal of blank rows and end of row paragraph marks
 - CodySoft now automatically removes blank rows and end of row paragraph marks in all tables in your document as part of both the Test the Template and Version creation processes.

Plan Benefit Package Module:

- 1. Clone Plan functionality
 - a. Cloning is useful if for example you are creating Employer Group Waiver Plans (EGWPs) based on existing Medicare Advantage plans.

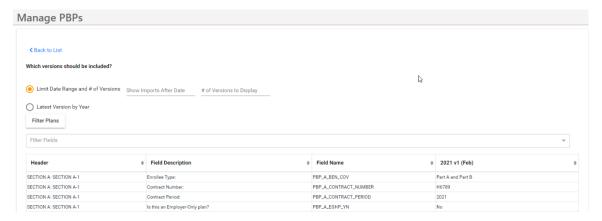


b. When complete, the new plan displays in the Past Imports in PBP Import, with the Name field clearly identifying the plan as a clone and the plan from which the new plan was cloned:



2. Plan History Report export:

- a. From the PBP Export screen
 - i. **Just the Latest Version** to export only the latest completed imported version of the current calendar year. In Progress imports are not included
 - ii. Also Include Previous Versions (Cannot Publish to CM) to export the latest version and the version that that preceded it.
 - iii. Latest Versions for each Year to export the latest final version from prior calendar years you specify, for example, exporting side-by-side versions of 2019 and 2020 data that can be used for comparison when working on an ANOC.
- b. From the Manage PBP's screen



- i. Ability to **Limit Date Range and # of Versions** to filter by those parameters
- ii. Select Latest Version by Year to filter by year

3. Field Archiving

- a. The set of fields that comprise a PBP report change every contract year. Old fields are removed, and new fields added. You may have outdated fields in your schema that you don't want to appear as choices in dropdown lists throughout the module.
- b. The Field Archive allows you archive and hide fields that are no longer valid using simple filters and field selections.

