

CodySoft February 27th 2020 release notes:

Collateral Management Module:

1. Automated removal of blank rows and end of row paragraph marks
 - a. 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.



Clone Latest Plan Version

Cloning latest version of plan 004-(H5508) from year 2019.

Contract Number

H5508

Plan Id

004

Segment Id

Contract Period

2019



Cancel

Submit

- 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:

Past Imports

Name	Updated On ↓	Updated By	Created On	Created By	File Name	Actions
Clone: 024-0(H5505) => 024-04(H5505)	2/25/20	Stephen Billias	2/25/20	Stephen Billias		
Clone: 024-0(H5505) => 024-0(H3636)	2/25/20	Stephen Billias	2/25/20	Stephen Billias		
Clone: 024-0(H5505) => 025-0(H5505)	2/25/20	Stephen Billias	2/25/20	Stephen Billias		
Clone: 024-0(H5505) => 024-3(H5505)	2/25/20	Stephen Billias	2/25/20	Stephen Billias		
Clone: 001-0(H1234) => 005-1(H6789)	2/20/20	Stephen Billias	2/20/20	Stephen Billias		

2. Plan History Report export:

a. From the PBP Export screen

- Just the Latest Version** to export only the latest completed imported version of the current calendar year. In Progress imports are not included
- Also Include Previous Versions (Cannot Publish to CM)** to export the latest version and the version that preceded it.
- 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

Manage PBPs

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Which versions should be included?

☒ Limit Date Range and # of Versions ☐ Latest Version by Year

Show Imports After Date # of Versions to Display

Filter Fields

Header	Field Description	Field Name	2021 v1 (Feb)
SECTION A: SECTION A-1	Enrollee Type:	PBP_A_BEN_COV	Part A and Part B
SECTION A: SECTION A-1	Contract Number:	PBP_A_CONTRACT_NUMBER	H6789
SECTION A: SECTION A-1	Contract Period:	PBP_A_CONTRACT_PERIOD	2021
SECTION A: SECTION A-1	Is this an Employer-Only plan?	PBP_A_EGHP_YN	No

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

3. Field Archiving

- 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.
- The Field Archive allows you archive and hide fields that are no longer valid using simple filters and field selections.

Field Archive

Archive Fields

Select Fields

Select Fields

Advanced Search

Header Name: Field Name:

Description: Custom?: ☒ All ☐ Custom Field ☐ Not Custom

<input type="checkbox"/>	PBP_D_OPT_APPLY_MOOP_YN Optional Supplemental - Label and Premium Package # 1
<input type="checkbox"/>	PBP_D_OPT_DEDUCT_YN Optional Supplemental - Label and Premium Package # 1
<input type="checkbox"/>	PBP_D_OPT_DESCRIPTION Optional Supplemental - Label and Premium Package # 1
<input type="checkbox"/>	PBP_D_OPT_IDENTIFIER Optional Supplemental - Label and Premium Package # 1