Service Team

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In our team's fast-paced environment, staying organized is crucial. To help our Benefits Team work more efficiently and collaborate better, we are introducing Monday.com. This article will explain the rollout process, training sessions, and available resources to ensure a smooth transition.

Monday.com Rollout

The main goal of using Monday.com is to help consultants manage their workflows for each client. By July 19, 2024, all consultants should be using Monday.com. Here's what you need to know:

- **Training Sessions and Office Hours**: From July 8, 2024, to July 19, 2024, we will hold training sessions and office hours. Attending these sessions is highly recommended. Each specialist team will have its own training sessions. Please attend these or watch the recordings if you miss any.
- **Resources on Monday.com**: Monday.com has a "Resources" board pinned at the top of the Main workspace, which includes:
  - Links to request forms for each specialist team.
  - An FAQ document with answers to frequently asked questions and helpful tips.
  - A link to provide feedback on the system and request changes.

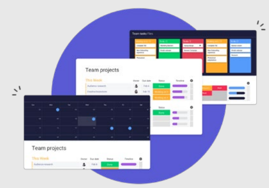
We understand this transition is a big task, but your participation will help all teams work more efficiently and collaboratively.

5500's: Progress Tracking and Updates

For the 2023 plan year filers starting January 1, progress tracking is currently managed through the SmartSheet: 2023 5500 Tracking Sheet. This sheet is accessible to everyone, allowing you to check your group's 5500 progress anytime. However, please note that SmartSheet notifications might be blocked, leading to some teams not receiving updates.

After January 2023 plan year filers, we will transition to using the 5500 Tracking Sheet on Monday.com. Key points to note:

- **Automatic Extensions**: Extensions will be automatically filed for 1/1 plan year groups with missing documents (Schedule A's or Data Request Forms) as of July 17th.
- **Support for the BA Team**: Due to the current short staffing in the BA Team, you may be asked to assist in retrieving missing Schedule A's from your carrier contacts.



Resources

To assist you with the 5500 process and other queries, we have compiled several resources:

- **Compliance Questions**:
  - General compliance questions can be directed to Benefit Comply.
  - Client-specific compliance questions should be directed to Bret McKitrick.
- **Wrap Documents Inquiries**: Contact Alexis Rettenberger for any questions about wrap documents.
- **5500 Filing Guide**: Click below for a guide to help filing signers complete the 5500 processes.

Learn More >

www.cbmicrosite.com/5500process