

A vertical yellow bar on the left side of the page.

Monday.com Tips & Tricks

- ◆ Best Practices Board
 - ◆ Board Filters & Views
 - ◆ Meeting Best Practices
 - ◆ Tracking Future Considerations
- 
- A green decorative bar at the bottom of the page, with a diagonal cut-off on the right side.



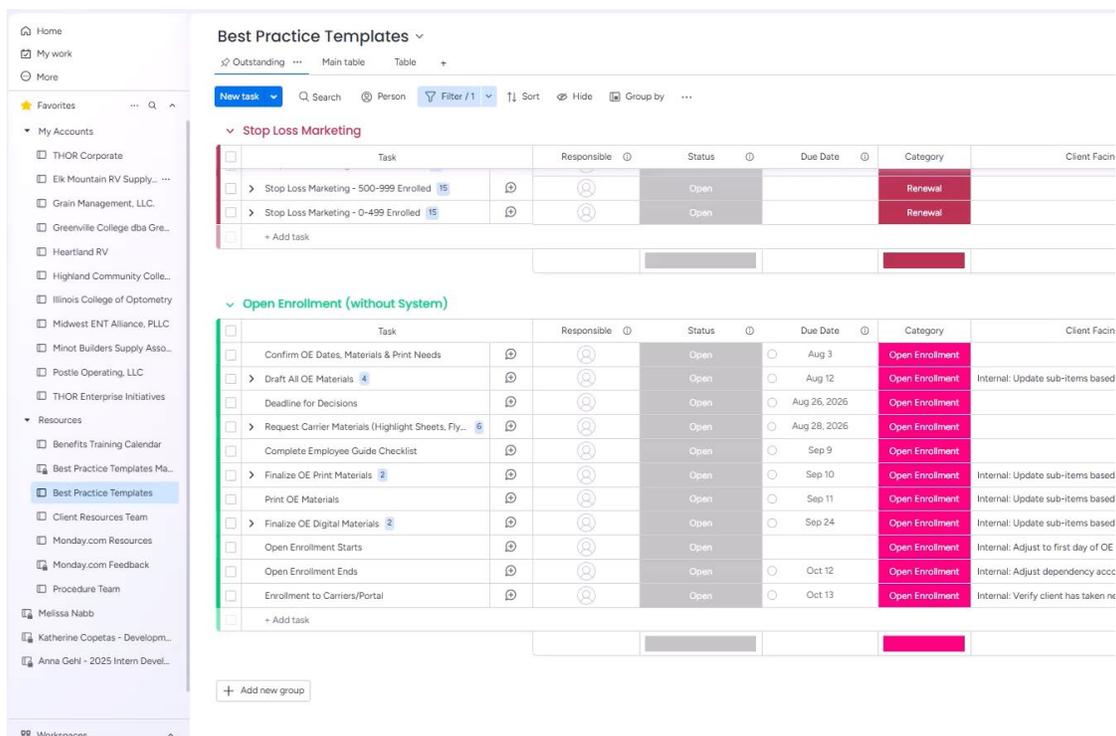
Best Practices Board

Use the [best practices board](#) to easily add already built procedures to your board!

Adding Doc Search Pro to Client Boards

- Navigate to the [best practices board](#)
- Click the check box to the left of the workflow (or entire group) you want to copy
- Click “duplicate”, and “duplicate with updates”
- This will duplicate the selected items with the word (copy) behind them
- Click “move to” and “move to board”
- Select which board and then which group you would like the items moved to (hit continue if a pop up comes up)
- These items will now be available on your board

CLICK IMAGE BELOW



The screenshot shows the Monday.com interface for 'Best Practice Templates'. The left sidebar contains navigation options like Home, My work, More, Favorites, My Accounts, and Resources. The main area displays two groups of tasks:

- Stop Loss Marketing** (Red header):

Task	Responsible	Status	Due Date	Category	Client Facin
Stop Loss Marketing - 500-999 Enrolled 15	[Avatar]	Open		Renewal	
Stop Loss Marketing - 0-499 Enrolled 15	[Avatar]	Open		Renewal	
- Open Enrollment (without System)** (Green header):

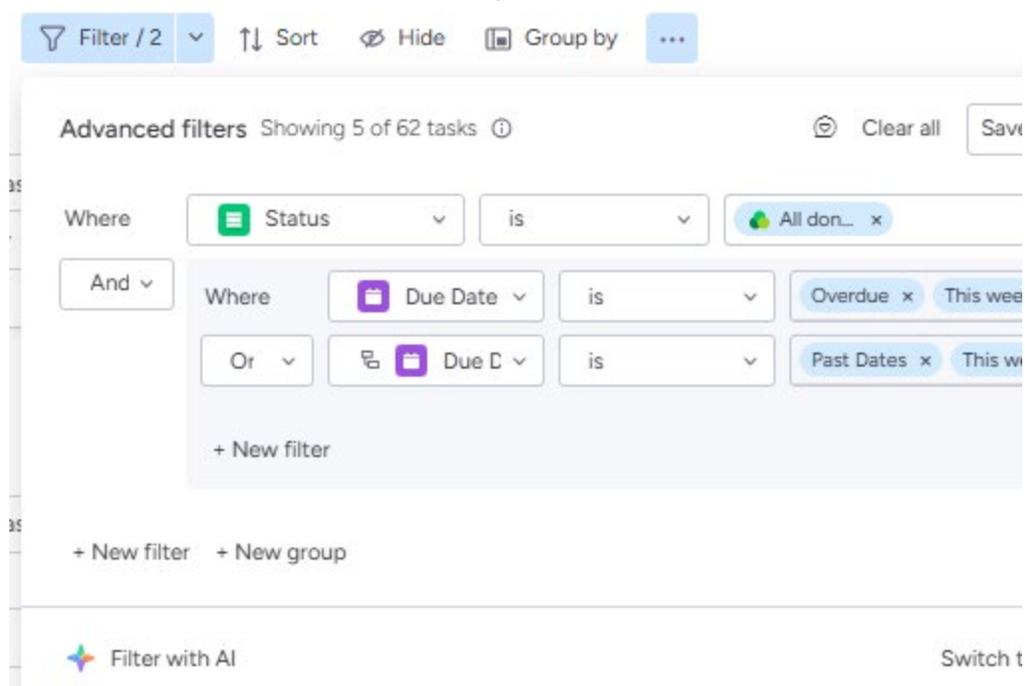
Task	Responsible	Status	Due Date	Category	Client Facin
Confirm OE Dates, Materials & Print Needs	[Avatar]	Open	Aug 3	Open Enrollment	
Draft All OE Materials 4	[Avatar]	Open	Aug 12	Open Enrollment	Internal: Update sub-items based
Deadline for Decisions	[Avatar]	Open	Aug 26, 2026	Open Enrollment	
Request Carrier Materials (Highlight Sheets, Fly... 6	[Avatar]	Open	Aug 28, 2026	Open Enrollment	
Complete Employee Guide Checklist	[Avatar]	Open	Sep 9	Open Enrollment	
Finalize OE Print Materials 2	[Avatar]	Open	Sep 10	Open Enrollment	Internal: Update sub-items based
Print OE Materials	[Avatar]	Open	Sep 11	Open Enrollment	Internal: Update sub-items based
Finalize OE Digital Materials 2	[Avatar]	Open	Sep 24	Open Enrollment	Internal: Update sub-items based
Open Enrollment Starts	[Avatar]	Open		Open Enrollment	Internal: Adjust to first day of OE
Open Enrollment Ends	[Avatar]	Open	Oct 12	Open Enrollment	Internal: Adjust dependency accc
Enrollment to Carriers/Portal	[Avatar]	Open	Oct 13	Open Enrollment	Internal: Verify client has taken ne

Board Filters and Views

Add filters and views to your boards to make drill down to specific items

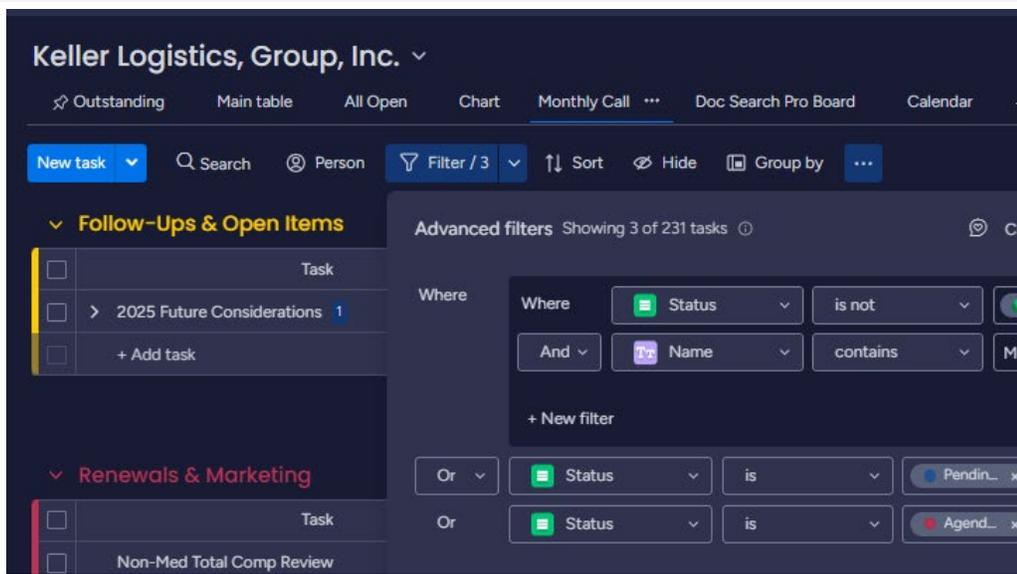
Adding Filters

- Example: Filter down to overdue and due this week
- Click the “filter” button and “new group”
 - Change “column” to “due date
 - Change “condition” to “in the next”
 - Click “overdue” and “this week”
 - Do the same steps above but now for the sub items. Overdue is “past dates” in subitems
(Note: there is the sub item symbol to help differentiate these once the filter is applied)
- Click “Save to this view”
- To remove the filter, click the x to the right of the filters



Adding Views

- Views allow you to visualize your board’s information in multiple different ways, and with different filters applied. You can make as many different views as you want!
- Example: Add a view for your “Agenda Items” for your upcoming client call
- Click the “+” to the right of “Main Table” and select “Table”
 - This will be a replica of your “outstanding” board
 - Rename the View by clicking the three dots to the right of “table”
 - Add a filter by the steps above where “column” is “status” and the far right drop down is “agenda item”
 - Click “save to this view”
- Tip: You can add a filter to a view containing key words. See example below for adding the key words “monthly call” as an additional filter.



CLICK IMAGES BELOW

Filters

Illinois College of Optometry ▾

Outstanding Main table Doc Search Pro Board

New task Search Person Filter / 1 Sort Hide Group by

Follow-Ups & Open items

Task	Responsible	Status	Due Date	Category	Client
Client Notes 2		Open		WSTL	
Year-End/Mid-Year Meeting Follow-Ups		Open	Jun 27	WSTL	
5500s for Illinois College of Optometry		Pending Carrier Action	May 2	Compliance	
Optum Rebate Reporting		Pending Carrier Action	May 23	Client Service	
FW: ICO - Audit Request Documentation		Open	May 26	Client Service	
Test Item 1		In Progress	May 29	Client Service	
Test Item 2		In Progress	May 30	Client Service	
Test Item 3		In Progress	May 31	Client Service	
+ Add task					

WSTL

Task	Responsible	Status	Due Date	Category	Client
Monthly Reporting 12		In Progress	Jan 31, 2026	WSTL	
Year-End Checklist		Open	Feb 28	WSTL	
Pre-Renewal/Renewal Meeting Follow-Ups		Open		WSTL	
Pre-Renewal/Renewal Meeting 3		Open	Oct 18	WSTL	
Year-End/Mid-Year Meeting 3		Open	Jun 24	WSTL	
+ Add task					

Views

Illinois College of Optometry ▾

Outstanding Main table Doc Search Pro Board

New task Search Person Filter / 1 Sort Hide Group by

Emailed items

Task	Responsible	Status	Due Date	Category
Illinois College of Optometry Census		Completed		Renewal
+ Add task				

Follow-Ups & Open Items

Task	Responsible	Status	Due Date	Category
Biometric Screening Quote 1		Completed		
Meeting Notes		Completed		
SF Budgeting Tool		Completed	Sep-9, 2024	
ICO Monthly report		Completed	Sep-20, 2024	Analytics
ICO Lag Report Through August		Completed	Sep-20, 2024	
ICO Monthly - Adding Dental		Completed	Nov-6, 2024	Analytics
Automated Monthly Report Errors		Completed	Jan-17	Analytics
Comm Request - Video Assistance		Completed	Jan-21	Communications
UMR Portal Access		Completed		Other
Optum Rx Savings Review		Completed	May-15	Pharmacy
ICO Monthly Reporting Debug Error		Completed	May-27	Analytics
+ Add task				



Meeting Best Practices

Preparing for a Meeting

- Use sub items to help manage tasks for upcoming meetings
 - Examples: pulling carrier reports, running tools (you can list all tools as a checklist in the comments bubble), requesting ipads, printing copies

2025 Mid-Year Meeting 8				
Subitem	Responsible	Status	Due Date	
Schedule Meeting	[Avatar]	Pending Client Action	May 30	
Run Tools	[Avatar]	Open	Jun 3	
Pull Reporting	[Avatar]	Open	Jun 3	
Fedlogic Reporting	[Avatar]	Open	Jun 3	
Draft PPT	[Avatar]	In Progress	Jun 6	
Peer Review	[Avatar]	Open	Jun 13	
Meeting Follow Up	[Avatar]	Open	Jun 21	
Coordinate Lunch Plans	[Avatar]	Agenda Item	Jul 18	

Managing Meeting Follow Ups

- There is a task on your boards for the core meeting’s “follow ups”
 - Enter your actionable meeting follow ups as sub items underneath this task
- Reminder: all WSTL meeting notes will be stored in the workdoc saved on the “WSTL notes” sub item under “client notes”

Mid-Year Meeting Follow-Ups 4				
Subitem	Responsible	Status	Due Date	
Updated consulting agreement	[Avatar]	Pending Internal Action		
Top large claimant on monthly	[Avatar]	In Progress		
Send NLP Info	[Avatar]	Open		
Delinquent 5500s	[Avatar]	Meeting Scheduled		
+ Add subitem				

- You can convert your notes from your workdoc to a task easily
 - Highlight the note from your workdoc you would like to make a task
 - Click the +Item Icon that shows up
 - Pick which board and group you want this task on

CLICK IMAGE BELOW

THOR Corporate

Outstanding Main table Agenda Items Due this week Completed Doc Search Pro Board Table +

New task Search Person Filter /1 Sort Hide Group by

Follow-Ups & Open Items

Task	Responsible	Status	Due Date	Category	Client Facing
Client Notes 2	[Avatar]	In Progress		WSTL	
Subitem	Responsible	Status	Due Date	Category	Client Facing Notes
2025 Monthly Calls	[Avatar]	Meeting Scheduled		WSTL	
2025 WSTL Notes	[Avatar]	Meeting Scheduled		WSTL	
+ Add subitem					
Total Comp Statement	[Avatar]	Pending Client Action	Jun 3	Analytics	
Comm Request - Formatting Assistance	[Avatar]	Open	Jan 24	Communications	
Comm Request - Translation Services	[Avatar]	Open	Feb 7	Communications	
Comm Request - Monthly Communication Campai...	[Avatar]	In Progress	Jun 23	Communications	
Corporate Wellness Program	[Avatar]	Pending Client Action	Jul 10	Strategy	Corporate to Pilot Well
Future Considerations 3	[Avatar]	Agenda Item	Jun 4	Strategy	
THOR National Account Monthly Report Review	[Avatar]	Open	Apr 30	Analytics	
GPS Request	[Avatar]	Open	Mar 28	Analytics	
Comm Request - Other	[Avatar]	Open	Apr 11	Communications	
Comm Request - Other	[Avatar]	Open	May 29	Communications	
Comm Request - Other	[Avatar]	Open	Sep 22	Communications	
Tech Request - Census Request	[Avatar]	Open	Jun 10	Technology	
Mid-Year Meeting Follow-Ups 4	[Avatar]	In Progress		WSTL	
+ Add task					



Tracking Future Considerations

Use a “Future Considerations” task for strategies to revisit down the road

Managing Future Considerations

- Add a new task in “Follow Ups & Open Items”
- Enter sub-items for each future consideration to revisit
- This is a great spot to store follow ups from core WSTL meetings that aren’t being immediately looked at, but are still on the docket to be discussed in later meetings

... **Follow-Ups & Open Items** 10 Tasks / 8 Subitems

<input type="checkbox"/>	Task		Responsible	
<input type="checkbox"/>	> Client Notes (Archived) 2			
<input type="checkbox"/>	> Client Notes 2			
<input type="checkbox"/>	▼ Future Considerations 4			
<input type="checkbox"/>	Subitem		Responsible	
<input type="checkbox"/>	BenefitWave			Age
<input type="checkbox"/>	FEDlogic			Co
<input type="checkbox"/>	Beneits 101 Call			Age
<input type="checkbox"/>	1/1/26 Renewal			Age
<input type="checkbox"/>	+ Add subitem			