Service Team

Content provided by Aaron Koehlhoeffer, Cassie Lowery, Seth Hoerner, and Stacey Cowhey.

Monday.com OKR Update & Consultant Standards

As part of our 2026 OKR to fully integrate Monday.com as our system of record, we're rolling out updates to bring more consistency to how Monday.com usage is defined, supported, and measured for Client Consultants and Associate Client Consultants.

- **What's Changing:** Clear, documented standards have been created to define baseline expectations for how Monday.com is used day-to-day across client boards. These standards outline what "meeting expectations" looks like in practice and will serve as a shared reference point moving forward.

- **How It's Measured:** A formal KPI framework is in place to consistently measure Monday.com utilization over time, aligned to observable board behaviors such as documentation, ownership, and follow-through.

- **Visibility & Reporting:** The Power BI Monday.com dashboard is in place to review individual metrics and board-level activity for all employees, including supervisors and managers.
  - **Power BI Monday.com Dashboard:** Monday Dashboard - Power BI Report Server

- **Reference Materials:** The Monday.com Consultant Standards document will be the primary reference for expectations and best practices, and align with goals for 2026.
  - **Monday.com Consultant Standards:** https://cb-benefits.monday.com/boards/9112257767/pulses/11386463737

- **What's Coming Next:** A formal launch and team training will be coming soon to walk through the standards, KPIs, and upcoming dashboard enhancements.

PowerPoint Branding & Template Update

To improve consistency across our Benefits materials and better align with updated corporate branding, we're rolling out refreshed PowerPoint templates. This update includes both a visual branding refresh and a transition to wide screen formatting.

- **What's New:** A Benefits-specific wide screen PowerPoint template is now available and reflects updated branding standards.

- **What This Means for the Team:** As you create or update presentations, please begin using the new template as part of your normal presentation prep.

- **What's Not Changing:** There is no need to retroactively update older decks unless they are actively being used. Some analytic tool outputs will remain in their current format for now and will be addressed separately.

- **Templates in Progress:** The C&B Overview & Client Resources presentation is being transitioned to the new format, and the Market Segment Team will begin converting additional templates over the coming months.

- **Timing & Support:** Our goal is for Benefits presentations to be using the new format by **June 1**. A short training and written transition guide will be shared soon to support a smooth, phased transition.

- **Resources:** The wide screen template and written transition outline will be available in the Resources Hub on Monday.com.

- **Wide Screen PPT Template & Transition Guide:** https://cb-benefits.monday.com/boards/9112257767/pulses/11388958676

Consolidated Appropriations Act (CAA) RxDC Reporting – 2025 Calendar Year

Key Deadline: June 1, 2026 - Submit Prescription Drug Data Collection Report

- Confirm that your client's health plan's annual prescription drug data collection report is submitted to the Center for Medicare and Medicaid Services (CMS) by June 1, 2026. Employer-sponsored health plans and health insurance issuers must annually report information about prescription drug spending to the federal government.

- Most carrier/vendor partners will assist in gathering and/or submitting the data on behalf of our clients but may require a survey or questionnaire to be submitted to them well in advance of the June 1 data submission deadline.

- New instructions released by the CMS have simplified the calculation of the average monthly premium. Instead of calculating the average monthly premium on a per-member basis, the total annual premium is now divided by 12. This change aims to make the reporting process easier and more straightforward.

- As a reminder, C&B's CAA Rx Reporting Tracker for how each unique carrier is handling the reporting and other information is saved in the O:Drive at \\liber.cb-sisco.com\data\Benefits\Shared\RX Cost Reporting

- If anyone discovers a carrier/TPA/PBM who has changed their data collection process from last year, please reach out to Melissa Naab or Zach Scott for updating the CAA Rx Reporting Summary
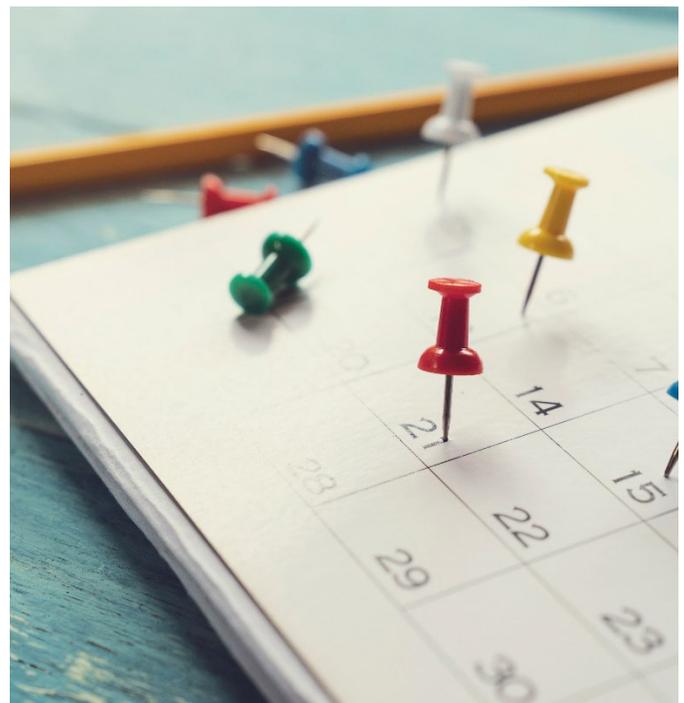
⚠ Upcoming Important Compliance Deadlines

March

- March 1st – Submit the Medicare Part D Disclosure to CMS (Calendar-year Plans Only)
  - Submit an online form to the Centers for Medicare and Medicaid Services (CMS) indicating whether your health plan's prescription drug coverage is creditable or non-creditable. The deadline for submitting this annual disclosure is 60 days from the beginning of the plan year.

- March 2nd – Provide ACA Form 1095-C and 1095-B to Employees

- March 31st — Electronically File ACA Forms 1094-C and 1095-C, and Forms 1094-B and 1095-B

June

- June 1st – Submit Prescription Drug Data Collection Report

Confirm that employer health plan's annual prescription drug data collection report is submitted to CMS by June 1, 2026. Employer-sponsored health plans and health insurance issuers must annually report information about prescription drug spending to the federal government.