

Service Team

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Hello Benefits Team!

Welcome to the July Service Team Newsletter! As a reminder, this newsletter is intended to take all of the great things our Teams are working on (Specialists, Consultants, Sales Team, etc.), and provide easy-to-use solutions and ideas for working with your clients.

Appreciate you all taking the time to review this, and as always, please feel free to send us any questions or ideas for future topics to cover!

Sincerely,

The Newsletter Team
(Stacey Cowhey, Aaron Koehlhoeffer, Cassie Lowery, Seth Hoerner)

Pharmacy Team's GPS Process

- No Changes! The Pharmacy Team greatly appreciates your support in using Monday.com so they can stay organized and as efficient as possible
- First 2 steps for consulting teams to complete before engaging the Pharmacy Team:
 - Rx Toolkit
 - Top Drug Review
- After consulting team reviews the output mentioned above, they should have an understanding and be able to ask, "Is the PBM performing or underperforming?"
 - **Performing:** Submit Monday.com form to invite incumbent PBM to renew through the Ringmaster platform.
 - *Not applicable for current MedOne/ControlRx groups*
 - **Underperforming:** Submit Monday.com form to provide guidance to the Pharmacy team and possibly schedule a meeting to align on next actions.
- New Pharmacy RFP Process
 - The Pharmacy Team utilizes Ringmaster to work through RFPs. Ringmaster will provide an overall better experience from start to finish, as it will help streamline the quoting process and provide valuable reporting insights.
 - The process for starting a PBM RFP is still the same. Please utilize the Monday.com ticketing system to start that process.
 - *If you have a 1/1/2026 pharmacy RFP and have not put in a ticket yet, please do so immediately!*

2026 Renewal Season: Tips, Tricks & Suggestions

Monday.com is Your Friend!

- The majority of the team has done a fantastic job engaging with Monday.com—thank you for your continued efforts! Here are a few best practices to keep in mind:
 - Track tasks that won't be resolved within 24 hours.
 - Always include a due date for new tasks (using a follow-up date is perfectly fine).
 - Meeting note tracking is required! This helps create efficiencies with where the meeting notes are for the entire Team.
- **Coming soon:** A new PowerBI dashboard will help monitor Consultant workbooks in aggregate. Now's a great time to ensure your boards are up to date!

Set Yourself Up for Success in Q3 & Q4

Strategic Planning - Use upcoming client meetings to get ahead on key items for 1/1/2026. Items to consider include, but are not limited to:

- **HDHP/HSA Compliance:** Confirm that plans meet 2026 requirements—especially that embedded deductibles haven't shifted to unembedded.
- **Medicare Part D:** Review current status and discuss potential changes with clients. A change might not be a bad thing!
- **Renewal Timelines & Marketing Efforts:** Set clear expectations and align on marketing strategies early.

Client Communications

- Linked below is a helpful fillable PDF from the Communications Team to help you organize and plan Open Enrollment communications.
- Q3 is a great time to refresh prior-year materials. Suggested updates include:
 - Updating dates from 2025 to 2026
 - Incorporating Super Notice updates (once available)
 - Adding new content for any 2026 programs or strategies



[Click Here to Access:](#)

- Communications Consultation Questionnaire
- 2025 PCORI Fee Calculations HRA

Compliance Reminders

PCORI Fees – Due July 31st

- Self-insured health plans or fully insured plans with an HRA must report and pay fees to fund the Patient-Centered Outcomes Research Institute (PCORI) by July 31, 2025.
 - This includes the Family Advantage Health Plan.
 - Please note, the calculation for an HRA is based on employee count, not member count. Attached is a customized calculator for HRA plans.
- Employers use IRS Form 720 to report and pay PCORI fees.

File Form 5500 for the 2024 Plan Year – Due July 31st

- File Form 5500 with the DOL by July 31, 2025, for your ERISA-covered employee benefit plans that operate on the calendar year unless a reporting exemption applies. An automatic extension of 2.5 months may be requested by filing IRS Form 5558 by the due date. Small welfare benefit plans (fewer than 100 participants) that are fully insured, unfunded, or a combination of insured/unfunded are generally exempt from the Form 5500 filing requirement.
- If C&B is assisting with the 5500 filing, all outstanding documents must be collected no later than **July 10th**. Please review the Monday board to confirm if you have any outstanding items: [\(21\) 5500 Tracking Sheet](#).

Tool Updates:

Analytic Tool Catalog has been refreshed

This resource is your go-to guide for the tools we use to deliver insights and drive impact. Take a few minutes to explore the catalog, which now includes clear instructions, and get familiar with what's available—especially if you haven't checked it out in a while.

New Procedure Doc Feedback Form

If you have a suggestion or see that improvements could be made to a current process to improve our services, please use the newly created [Monday.com Board](#) to document it

- To create a suggestion, please complete each field on the form
- Following the completion of your suggestion a teammate will reach out to discuss the topic in more detail