

# Team Task List



Team/role	Frequency	Day	Back Up	Trained	Altelyx Used	In Altelyx Server	UNC?	Yearly Formula Update?	Process Documentation	Time Off	Weekly Notes	Retired Process	Old Frequency	Column11	Column12	Column13	Column14	Column15
<b>Jessie</b>				👍														
Benefits Inbox	Daily		Katherine	👍								email removed report	weekly					
Benefits Information Requests From Legal	As Needed		Katherine	👍								LOA for vacation/leave report	Bi-Weekly					
TM Issues - Benefits	Daily		Katherine	👍								QDRO transfer						
Benefit Trainings	Weekly		Katherine	👍							Update Jansport Deck - Call days = M & Tu	Ad-Hoc Covid/Sick Leave Reports	As Needed					
Adoption report	Monthly		Katherine	👍							Definition of what a backup looks like	Visually Florida Reporting Monthly Master	Monthly					
M&A (Mergers & Acquisitions)	As Needed		Katherine	👍														
Legal Issues	As Needed		Niki	👍														
Appeals (non points)	As Needed		Katherine	👍														
Claims Issues	As Needed		Katherine	👍														
Vendor Management	As Needed		Katherine	👍														
Disabled Dependents	As Needed		Katherine	👍							if able to Antwan, need current list to Antwan by 11-18							
Cigna Network Issues	As Needed		Katherine	👍														
<b>Maria</b>				👍														
Education Inbox	Daily			👍														
Education Appeals	Daily			👍														
Forms	Daily			👍														
Mail	Daily			👍														
Invoicing	Daily			👍														
ASN in Progress Audit	Daily			👍														
Pull Daily Reports	Daily		Kate, Rin	👍														
Mik Book	Daily			👍														
Back Up Care Projections	Daily		Rin	👍														
Back Up Care Reporting & TM Questions	Daily			👍														
<b>Shelley</b>				👍														
Bridge Repayment Process	Monthly			👍														
Tuition Reimbursement Doc Updates	End Of Year			👍														
Probation Triggers & Letter Updates	As Needed			👍							moved to back-burner, with non-engaged as priority							
Non-engaged teammates outreach plan	Monthly			👍														
Non-complex Appeal Process Development	As Needed			👍														
School Mapping Request from BH	Quarterly			👍														
TM Issues - Education				👍														
<b>Kate</b>				👍														
ATP Processing	Bi-Weekly		Katherine	🌟														
Bridge Ad Hoc Reporting	Bi-Weekly		Rin	🌟														
Bridge Participant Tracking	Bi-Weekly		Niki, Rin	🌟														
Education Metrics	Monthly		Rin	🌟														
San Francisco Reporting	Quarterly		Katherine	👍														
NY Reporting	Quarterly		Katherine	👍														
Data Compare	Bi-Annually	Feb & Aug	Katherine, Rin	🌟														
401K/403B Reporting	Annually			👍							move to Erin?							
Ed Goal Reporting	Annually			👍														
Year End	End Of Year			👍														
Weekly Workday Call	Weekly			👍														
Dependent Care Imputed Income	End Of Year			👍							move to Erin?							
Testing	As Needed		Katherine, Niki, Rin	👍							if Kristin							
Projects/Requirements	As Needed		Katherine, Niki	👍							if PROSSON, Antwan, CE, Hours Audit Revised							
Ongoing Bridge Reporting/Repayments	TBD		Rin	👍														
RN to BSN Development & Reporting	TBD		Rin	👍														
<b>Bridge Audit</b>				🌟														
<b>Bridge Team/Withdrawal Collection</b>				🌟							if pending process outline - logging as Kate based on being							
<b>Katherine</b>				👍							if pending process outline - logging as Kate based on being							
ACA Reporting/Auditing/Inbox	Bi-Weekly		Niki, Rin	👍														
Communications	As Needed			👍							if Audit expectations to come - meeting with new client rep							
HPAA - maintain binder & training				👍														
Budget - April & May	Monthly		Niki	👍							still needed?							
Premium Billing & FMR Reports	Monthly		Kate	👍							if to confirm with TFC on need steps now that Josh has left							
DCRA NOT	Annually		Kate, Niki	👍														
1099/1094 Filing	Annually		Niki, Rin	👍														
Annual Notices	Annually			👍														
Medicare part D	Annually			👍														
MA HRID	Annually			👍														
ACA Fine Research	As Needed		"Niki, Kate, Katherine, Erin"	🌟														
<b>Erin</b>				👍														
Daily Leave Records Report	Daily			🌟														
Back Up Care/COON Audit	Bi-Weekly		Rin	🌟														
Rescind Report	Weekly	Monday		🌟														
Eligibility & Integration Files	Weekly	Friday - Wednesday		🌟														
ASO funding	Weekly	Varies		👍														
LOA reports (Recruiting, Exempt)	Weekly	Monday	Katherine	🌟														
Workday 90 Day Ratio Transactions	Weekly	Wednesday	Kate, Katherine	🌟														
Guid Eligibility Report	Weekly	Monday		🌟							(trial to name)							
Pulse Cash Reporting	Bi-Weekly	Thursday	Katherine	🌟							Ends 12/31/2021							
Rawlings Report	Bi-Weekly	Monday	Jeanette	🌟							May be ending							
Payroll	Bi-Weekly	Friday	Katherine	🌟														
HSA Funding/Auditing/Updates	Bi-Weekly	Monday		🌟														
401k Adjustments	Bi-Weekly	Thursday	Kate	🌟														
Baby Blanket Report	Monthly	1st Of Month	Katherine	🌟														
Revue Award Kts	Monthly	10th Of Month	Kate	🌟														
PCT Award Kts	Monthly	1st Of Month	Katherine	🌟														
PTD Cap Reports	Monthly		Katherine	🌟														
Grandfathered Medical to Alan	Monthly	15th Of Month	Katherine	🌟							Ends 12/31/2021							
NYC Covid Sick Leave Report	Monthly	1st Of Month	Katherine	🌟							Likely to end Q4-EOD							
Hours Audit	3x Per Year		Kate, Katherine	🌟														
PCORI Fee Facilitation	Annually			🌟														

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Ad Hoc Report Requests for LDA	As Needed		Katherine	★	●	✖					x								
Death Claims	As Needed	Varies	Jeanette	★							5								
Hours Worked/TM on LDA	B-Weekly	Monday		★	●	✔					Automated								
Commuter Benefit Files	Monthly		Kate, Katherine	★															
BH Control Total Compare	B-Weekly	Friday	Kate	★					(Retired to name)		x								
Dashboard				☆							Ongoing Build								
Exceptional Tracker				☆							Ongoing Build								
Not getting done				★															
Reduced Term Collection				★															
Pittsburgh Card Refinancement				★															
Answers Outside of Payroll				★															