

**CAUTION**

You may fall in love  
with compliance after  
getting to know our ...

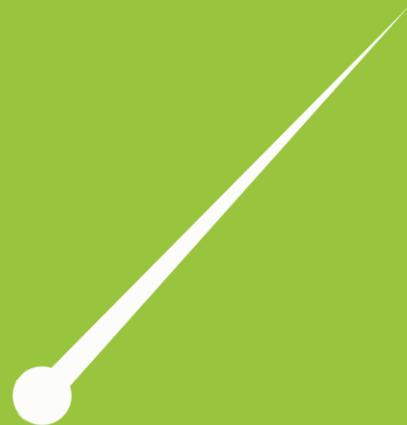
**C**ompliance  
Dashboard®

Before we start, we just  
wanted to tell you that

**WE MAKE COMPLIANCE**

**COOL 😎 ...JUST SAYIN'.**

*No really. We do!*



So what on earth is ComplianceDashboard?

## WELL, IT'S AN OPPORTUNITY...

To finally enjoy ***peace of mind.***  
(*Only if you need some!* )

To ***avoid very real & costly fines.***  
(*Um...yeah! Ain't nobody got time for that!*)

To, at long last, ***understand & comply*** with  
these (*insert favorite frustration word here*)  
ever-changing regulations.

## IN SHORT?

It will make your compliance life simpler...**so you'll have time for others things.** 🎂 🍺

***So how do we do it?***

# Simple! By...

- **Reminding you** when compliance tasks need to be reviewed.
- Giving **crystal-clear guidance** on what tasks need to be completed and how to do them.
- Providing compliance **tracking and documentation**.

*Now this is cool!*

## MEDICARE PART D

### Take Action!

#### WHAT YOU NEED TO KNOW

- Employers that provide drug coverage to Medicare Part D eligible individuals must determine whether its drug coverage is at least as good (creditable) as the [standard health benefit](#) under Medicare Part D.
  - The determination must be certified by an actuary unless the employer qualifies for the [simplified determination](#) of creditable coverage.
- A [notice](#) of this determination must be provided to all Medicare eligible individuals.🕒

#### WHAT YOU NEED TO DO

- 1 Determine whether the drug coverage provided under your plan is [creditable](#).
- 2 Provide a [notice](#) (using the [model notice](#) or a customized notice) of this determination to Medicare eligible individuals **by October 15th of each year**, and as otherwise required.🕒
- 3 Don't forget that Medicare eligible individuals may include spouses, dependents, COBRA qualified beneficiaries, retirees, and others who are eligible for the plan.
  - To ensure no one is missed, many employers simply provide the notice to **all** eligible employees and retirees.

#### CMS DISCLOSURE

You must also disclose this determination to CMS **within 60 days** of the end of the plan year. You will receive a separate [reminder](#) prior to this due date.

#### WHEN IS IT DUE?

- The notice must be provided:
  - Annually by October 15th of each year;
  - When a Medicare eligible individual joins the plan;
  - If the drug benefits change from creditable to non-creditable (or vice versa); and
  - Upon request

#### WHY COMPLY?

- Individuals who do not receive timely and accurate notification of the plan's creditable coverage status may incur a late enrollment penalty when applying for Medicare Part D.

SYSTEMS/MANDATES 

#### Status

✓ **DOCUMENTED**

11/13/2019  
Sent to employees via email on 09/15

Edit Undo

#### Document Manager

Systems/Mandates  
Annual

+ Add Company Files

#### Sample Documents

[Medicare Creditable Coverage Notice.doc](#)  
**Distribution Requirement:** Send to participants annually before October 15th or if creditable or non-creditable coverage status changes. See the Notice Distribution Requirements in the Medicare Part D compliance activity for more information. [Spanish Version](#)

[Medicare Non-Creditable Coverage Notice.doc](#)  
**Distribution Requirement:** Send to participants annually before October 15th or if creditable or non-creditable coverage status changes. See the Notice Distribution Requirements in the Medicare Part D compliance activity for more information. [Spanish Version](#)

**OK.** So, how will you be reminded about reviewing and documenting ever-changing, kinda boring, and mostly dreaded compliance **tasks?**

Via simple easy-to-understand emails.

*Like this one!*



## MEDICARE PART D

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### It's time to document a Health & Wellness task!

#### What it is:

**Medicare Part D:** Plans that provide drug coverage to Medicare part D eligible individuals must distribute an annual notice that tells these individuals whether the drug coverage under their plan is creditable.

#### When it's due:

This notice must be provided: (i) annually by October 15th of each year; (ii) when a Medicare eligible individual joins the plan; (iii) if the drug benefits change from creditable to non-creditable (or vice versa); and (iv) upon request.

#### What you need to do:

##### TAKE ACTION!

- 1 Determine whether the drug coverage provided under your plan is **creditable**.
- 2 Provide a **notice** of this determination to Medicare eligible individuals at the required times (as indicated above) to all eligible employees and retirees..

#### Why you should comply:

Individuals who do not receive timely and accurate notification of the plan's creditable coverage status may incur a late enrollment penalty when applying for Medicare Part D.

Need more info?

View Task

Already done?

Document Task

# Celebrate!

All your compliance tasks will get assigned to ONLY 2 categories:

## Check It!

After one email alert, the task status will show as **Notified**.

If you add notes, it will show as **Documented**.

## Take Action!

These have specific deadlines and **must** be documented.

If these tasks go **Past Due**, you will receive additional email reminders.



### HIPAA Security

Take Action!



### Medicare Coordination of Benefits

Check It!



### Nondiscrimination Testing

Take Action!



Past Due



Notified



Documented

## Which User Are You? Choose You!



TAKES ACTION!

### **BENEFIT ADMINISTRATOR USER**

- Receives email alerts from the Dashboard
- Documents compliance tasks



DOES IT ALL!

### **BLENDED USER**

- Receives email alerts from the Dashboard
- Documents tasks
- Oversees team's compliance efforts
- Runs reports, manages users & delegates tasks



SUPERVISES!

### **HR MANAGER USER**

- Does NOT receive email alerts
- Does NOT document compliance tasks
- Oversees team's compliance efforts
- Runs reports, manages users & delegates tasks



GEEKS OUT!

### **RESEARCH ONLY USER**

- Does NOT receive email alerts
- Does NOT document compliance tasks
- Uses the Dashboard for compliance research

**Bonus!** A few tools for **Blended** or **HR Manager Users** only.

 HOME  MY ACCOUNT  ADMIN  FAQ  LOG OUT

## ADMINISTRATION TOOLS

The ADMIN menu allows you to manage user information and functionality, as well as download task reports.



Compliance  
Toolbox



Download  
Task  
Report



Manage  
Users



Manage  
Tasks

# Told Ya We'd Make It Simpler!

*Maybe not as cool as we thought...but definitely simpler!*



Compliance  
Dashboard®

*Another Capstone division making things simpler™*

*Have more questions? Check out the FAQs on your Dashboard!*