

Integrated Solutions for Leave of Absence Administration



Agenda

Introduction to FMLASource

Leave of Absence Administration

- Your Role and Responsibilities
- FMLASource Role and Processes

Questions

Introduction to FMLASource



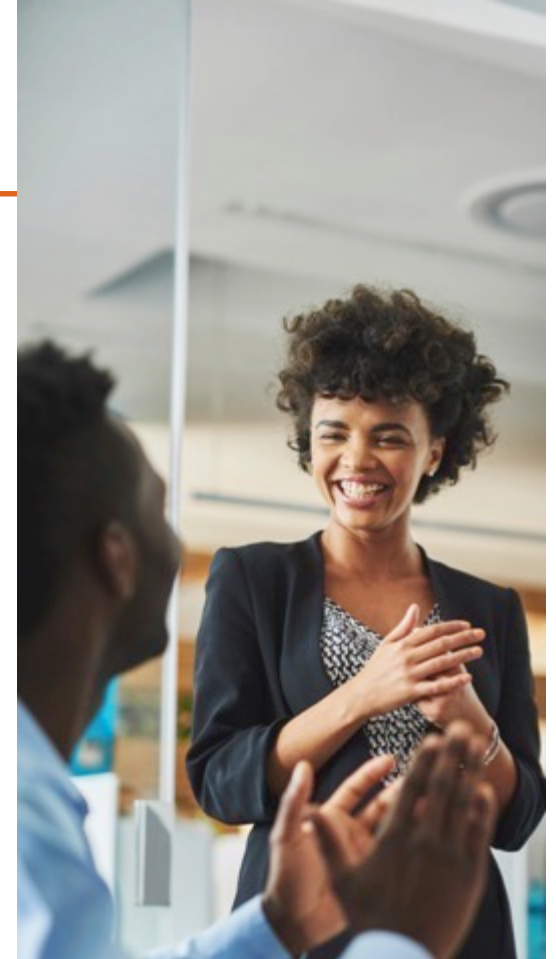
FMLASource - Who We Are

A division of ComPsych, created in 1999

A leading third party leave administrator

- Over 3,200 client partners
- Over 3.7 million employees covered

Our extensive network enables us to provide robust leave benchmarking data for your specific industry, to identify trends and guide strategy



FMLASource - What We Do

Services provided, effective September 1, 2020:

- Compliant administration of your federal and state mandated leaves of absence
 - Perform leave intake
 - Determine employee eligibility
 - Send leave-related notices and correspondence
 - Collect/process certification paperwork
 - Track leave entitlement/usage
 - Report leave requests, decisions and absences to your team
 - Help identify leave fraud/abuse

FMLASource - Leaves We Administer for You

Family and Medical Leave Act (FMLA) leaves

- Eligibility – must have worked 1250 hours in the previous 12 months AND been with employer for 1 year
- Up to 12 weeks* of unpaid job/benefit protection in 12 month period
- For one's own serious health condition or care of an immediate family member

* 26 weeks to care for injured military service member

Leave of Absence Administration – Your Role



Your Role - Overview

Identify potential leaves we handle

- Medical reasons
- Disability-related reasons
- Family-related reasons
- Military reasons

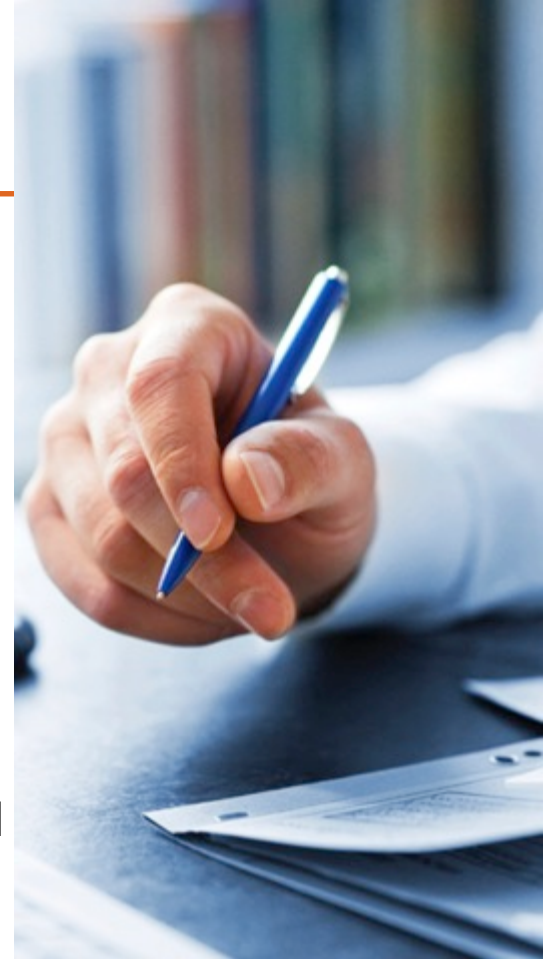
Reinforce proper call-off procedures

- TWO CALLS: FMLASource and current call-in method

Reconcile absences

Other expectations

What to avoid



Your Role – Identify Potential Medical Leaves

Direct an employee to us when leave is needed for:

- Medical reasons
 - FMLA or state medical leaves
 - Pregnancy/prenatal care
 - An overnight stay at a hospital or medical care facility
 - Illness or incapacitation for more than 3 days
 - Repeated absences for the same chronic health condition (examples: asthma, diabetes, migraines)
 - Permanent or long-term conditions/treatments (examples: cancer, stroke, Alzheimer's)

Your Role – Identify Potential Family-Related Leaves


Direct an employee to us when leave is needed for:

- Family-related reasons
 - FMLA or state family leaves
 - Arrival of a new child (newborn bonding or adoption/foster care)
 - Care of an immediate family member with a serious health condition
 - Spouse, Child, and Parents (includes step child/parent, foster child/parent)
 - In-loco parentis

Your Role – Identify Potential FMLA Military Leaves

Direct an employee to us when leave is needed for:

- Military Reasons (NOT for employees who are in service)
 - FMLA
 - Care for a family member who becomes seriously ill or injured related to military service
 - Qualifying exigencies – emergencies caused by family member being called into military service



Leave for
family
member
in service

Your Role – Reinforce Proper Call-Off Procedures

Remind employees of proper call-off procedures for each leave type:

	Intermittent	Continuous	Reduced Schedule
Definition	Sporadic/episodic absences	Uninterrupted block of days missed	Pre-arranged schedule of days/hours to be missed
Example	Occasional migraines	New child bonding	Knee rehab appointments
Employee's responsibility	<ol style="list-style-type: none"> 1. Follow your normal call-off procedure for each absence 2. Contact FMLASource within 48 hours of each absence – Report Provided on Mondays 	<p>No need to call with each absence; approved leave serves as notice BUT employee needs to contact FMLASource if:</p> <ol style="list-style-type: none"> 1. Start date changes 2. End date needs to change—sooner or later 	<p>No need to call with each absence; approved leave serves as notice BUT employee needs to contact FMLASource if schedule needs change</p>

FMLASource – Tracking Intermittent Leaves

Employees can report intermittent absences to us via:

- Website: www.fmlasource.com
- Smartphone App: FMLASource Now
- E-mail FMLACenter@fmlasource.com
- Phone: 1.833.786.8644
- Live service 7:30 a.m. – 9:30 p.m. CT, Monday - Friday
 - Automated (IVR) phone system

We summarize dates of absence on the *Leave Usage Report*

- Report shows the FMLA time reported by or used by employees in the last week
- Report can be used to reconcile our absence data with yours
- Report is sent on Monday's to Managers and HRBP

Your Role – Reconcile Absences

Potential issue: employees may report absences to your team but not to FMLASource

- When this happens, time is not deducted from the employee's entitlement bank

Solution: reconcile absences on our *Leave Usage Reports* with absences in your timekeeping system

- Report discrepancies to fmlacenter@fmlasource.com

Category	Sub-Category	Leave Request #	Employee #	Last Name	First Name	Leave Frequency	Date of Absence	Date Reported	Reported Hours	Protected Hours	Unprotected Hours
Intermittent	Taken	1877136	79635	ADKINS	SAVANNAH	Intermittent	2/2/2018	2/22/2018	8.00	0	8.00
Intermittent	Taken	1981555	75059	CHANCE	WHITNEY	Intermittent	2/9/2018	2/22/2018	8.00	0	8.00
Intermittent	Reported	1819513	77382	MATTHEWS	RACHEL	Intermittent	1/15/2018	2/22/2018	12.00	0	12.00
Intermittent	Revised	1994544	77957	SAMUELSON	EVE	Intermittent	1/26/2018	2/22/2018	12.00	0	12.00
Intermittent	Revised	1994544	77957	SAMUELSON	EVE	Intermittent	1/27/2018	2/22/2018	8.00	0	8.00
Intermittent	Cancelled	1981555	75061	THORNE	CHARLES	Intermittent	1/20/2018	1/21/2018	10.00	0	10.00
Intermittent	Protection Status Change	1981555	75061	THORNE	CHARLES	Intermittent	1/21/2018	1/22/2018	8.00	0	8.00
Continuous	Taken	2004070	76714	DALY	KEITH	Continuous	1/31/2018	2/20/2018	10.00	10	0.00
Continuous	Taken	2004070	76714	DALY	KEITH	Continuous	2/1/2018	2/20/2018	10.00	10	0.00
Continuous	Taken	2004071	76715	STARR	MORGAN	Continuous	2/19/2018	2/20/2018	10.00	10	0.00
Continuous	Taken	2004072	76716	WILLIAMS	STANLEY	Continuous	2/21/2018	2/20/2018	10.00	10	0.00
Continuous	Reported	2004073	76717	MARKS	STACY	Continuous	3/1/2018	2/20/2018	10.00	10	0.00
Continuous	Reported	2004073	76717	MARKS	STACY	Continuous	3/5/2018	2/20/2018	10.00	10	0.00
Continuous	Cancelled	2004074	76718	GONZALEZ	PEDRO	Continuous	1/29/2018	2/20/2018	10.00	10	0.00
Continuous	Cancelled	2004074	76718	GONZALEZ	PEDRO	Continuous	2/8/2018	2/20/2018	10.00	10	0.00
Continuous	Protection Status Change	2004075	76719	MICHAELS	JAN	Continuous	1/30/2018	2/20/2018	10.00	10	0.00
Continuous	Protection Status Change	2004075	76719	MICHAELS	JAN	Continuous	2/20/2018	2/20/2018	10.00	10	0.00
Reduced Schedule	Taken	2008990	80697	BRAGG	KATHY	Reduced Schedule	2/20/2018	2/7/2018	4.00	0	4.00
Reduced Schedule	Cancelled	1982603	78303	CRAIG	DELILAH	Reduced Schedule	2/8/2018	2/22/2018	12.00	0	12.00
Reduced Schedule	Protection Status Change	2008990	80697	BRAGG	KATHY	Reduced Schedule	2/21/2018	2/7/2018	4.00	0	4.00

Your Role – Other Expectations

Maintain employee confidentiality

- Disclosure of confidential information may result in liability

Consistently apply and adhere to company policies

Notify HR of suspected FMLA abuse or fraud

- Exceeding frequency or duration
- Patterning
- Doubt regarding reasons leave is taken

Require a return to work form before an employee returns from continuous leave for own health condition

- FMLASource has a standard RTW form that will be sent to the employee

Remember that there are no “magic words” for requesting FMLA leave

- If in doubt whether FMLA or any other leave may apply, send the employee to us

Your Role – What to Avoid

Do NOT terminate or discipline employees on approved or requested leave without contacting HR/Employee Relations

- HR, not FMLA Source, makes employment decisions
- We can provide latest leave status updates to help assess risk

Do NOT ask about employee medical conditions or diagnoses

- Employee may volunteer this information, but tread carefully

Do NOT mandate/expect work from employee on leave

- Contact HR if you may need something from the employee on leave

Do NOT discourage employees from taking leave

- Avoid claims of “interfering” with an employee’s right to FMLA or state leave
- Do not making disparaging remarks about employees who do take leave

Leave of Absence Administration – FMLASource Role and Processes



FMLASource – Standard Leave Process



Employee (or HR if necessary) requests leave:

- Website: www.fmlasource.com
- Smartphone App: FMLASource Now
- E-mail FMLACenter@fmlasource.com
- Phone: 1.833.786.8644
 - Live service 7:30 a.m. – 9:30 p.m. CT, Monday - Friday
 - Automated (IVR) phone system (24 hours)

FMLASource – Standard Leave Process



We will:

- explain leave process and company policies
- open a leave request in our system
- determine eligibility for FMLA or other leave
- seek authorization to contact health care provider if needed

The newly requested leave will appear on a *Leave Requests and Status Report* sent on Monday's

FMLASource – Standard Leave Process



Within 5 business days of the request, we will send:

- leave “request letter”
- “your next steps” document
- required rights and responsibilities documents
- blank medical certification form
- any applicable return to work documentation

We will notify employees by phone or email of approaching deadlines

FMLASource – Standard Leave Process



Employee or health care provider must return completed paperwork

- Due 15 days after issuance, plus your grace period (7 days)
- Incomplete paperwork - additional 7 days to “cure”
 - FMLASource will conduct outreach to health care provider on behalf of employee if authorized by employee

We will notify employees by phone or email anytime paperwork is received

FMLASource – Standard Leave Process



We will send:

- a leave “decision letter” indicating approval, denial or partial approval
- “your next steps” document
- any applicable return to work documentation

FMLASource – Standard Leave Process



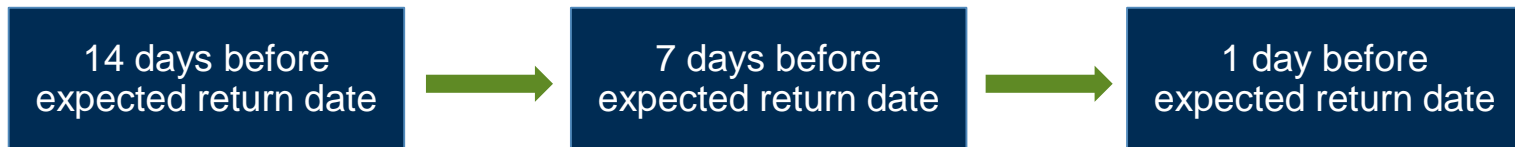
The new leave decision will appear on a *Leave Requests & Status Report*:

Category	Sub-Category	Leave Request #	Employee #	Last Name	First Name	Frequency	Begin Date	End Date	Leave Plan	Status	Status Reason
New Leave Requests	New Leave	1951002	12345	ALBERTS	REBECCA	Continuous	1/4/2018	1/4/2018	FMLA	Requested	Certification Needed
New Leave Requests	New Leave	2029437	67890	AYERS	ANGELA	Continuous	3/29/2018	5/10/2018	FMLA	Requested	Pending Review
New Leave Requests	New Leave	1826479	23456	BEST	DONNA	Continuous	10/10/2017	1/20/2018	ADA	Requested	Coaching Process
New Leave Requests	Extension	2021274	34567	DONAHUE	SANDRA	Continuous	2/20/2018	3/4/2018	FMLA	Approved	Certification Needed
New Leave Requests	Extension	2026396	12346	DARLING	LOU	Intermittent	2/12/2018	4/30/2018	FMLA	Approved	Certification Needed
Leave Updates	Leave Plan, Status	2004070	89012	ADKINS	KEITH	Continuous	1/29/2018	3/5/2018	FMLA	Approved	End of Leave Approaching
Leave Updates	Begin Date, End Date, Status	2004070	89012	ARTHUR	ANGELA	Intermittent	1/29/2018	1/28/2019	FMLA	Approved	
Leave Updates	Status	2015628	90123	MCDONALD	BETTY	Intermittent	2/19/2018	5/14/2018	FMLA	Approved	
Leave Updates	Status, Status Reason	1922446	98765	NOONAN	DEIDRA	Continuous	1/29/2018	2/4/2018	FMLA	Approved	Requested Dates Not Certified
Leave Updates	Status	1922488	98774	SINGER	MARK	Continuous	2/5/2018	3/18/2018	FMLA	Approved	
Leave Updates	Leave Plan	2020527	45678	BEELER	JANET	Continuous	2/15/2018	2/23/2018	FMLA	Requested	Document Received - Awaiting Decision
Leave Updates	Begin Date	1828740	56789	BENNINGHOF	EVELYNE	Continuous	10/1/2017	10/4/2017	FMLA	Requested	Internal Review
Leave Updates	Status Reason	1826479	23456	BEST	DONNA	Continuous	10/10/2017	1/20/2018	ADA	Requested	Coaching Process
Leave Updates	Workers' Comp-Emp Provided	1997451	32109	CLARK	MARY	Continuous	1/19/2018	4/13/2018	ADA	Requested	Coaching Process
Leave Updates	End Date, Status Reason	2021274	10987	DONAHOE	SANDRA	Continuous	2/20/2018	3/4/2018	FMLA	Approved	Certification Needed
Other Active Leaves	Other Active Leaves	1845843	55555	ADAMS	BOYD	Intermittent	9/21/2017	10/21/2017	FMLA	Requested	
Other Active Leaves	Other Active Leaves	1892355	11111	LANE	LORETTA	Intermittent	10/2/2017	10/1/2018	FMLA	Approved	
Other Active Leaves	Other Active Leaves	1897971	11111	LANE	LORETTA	Intermittent	10/2/2017	10/1/2018	FMLA	Approved	
Other Active Leaves	Other Active Leaves	1897826	66666	MATTHEWS	REBECCA	Intermittent	10/16/2017	10/15/2018	FMLA	Approved	
Other Active Leaves	Other Active Leaves	1935664	88888	SAMUELSON	HEATHER	Continuous	3/14/2018	4/3/2018	FMLA	Approved	

FMLASource - Return to Work

FMLASource will:

- Provide the employee (and healthcare provider, if authorized) with any required return to work documents
 - We direct employees to return these forms to your team
- Request employee's confirmation of return to work date



Employees with a confirmed RTW date will show “End of Leave Confirmed” on the Return to Work Report sent on Monday’s to Managers and HRBP.

FMLASource Resources

	FMLA Inbox (fmlacenter @fmlasource.com)	Phone (833.786.8644)	Website (fmlasource.com)	Phone App (FMLASource® Now)	Account Manager (Partners with HR)
Open new leaves	X	X	X	X	
Track leave time	X	X	X	X	
Request extensions	X	X	X	X	
Report return to work	X	X	X	X	
Customize and run reports			X	X	
View employee data			X	X	
24-hour access to leave data			X	X	
Solve complex leave issues					X
Discuss compliance concerns					X
Discuss abuse/recertification					X

Online Training on FMLASource Website fmlasource.com With Q&A Session

Questions and Answers

Questions?