Employer Questionnaire: Evaluating and Implementing a Leave Planning Tool

Use this checklist to assess the fit, readiness, and implementation requirements of a leave planning tool. For each item, check the appropriate status, assign an owner where needed, and capture notes or follow-up actions. The checklist is designed for HR directors and benefits leaders responsible for benefits administration, leave management, employee experience, compliance, and vendor oversight.

1. Use the questions during vendor discovery, finalist demonstrations, contract discussions, implementation planning, or renewal reviews.
2. Ask each vendor or partner to explain how the tool works today, what is configurable, what is planned for future development, and what responsibilities remain with the employer.
3. Document whether each capability is available now, available through configuration, dependent on integration, or not currently supported.
4. Involve stakeholders from HR, benefits, leave administration, payroll, HRIS, legal/compliance, communications, and employee experience early in the process.
5. Use the "Why this matters" explanations to evaluate business impact, implementation complexity, compliance exposure, and employee experience.

L – Lifecycle and Maturity

Question / Evaluation Item	**Why This Matters**	**Notes / Follow-Up**
What stage of development is the tool in today: early-stage, expanding, mature, or enterprise-ready?	A tool's maturity affects implementation risk, support needs, scalability, and how much the employer may need to help shape future functionality.	
How many employers, employees, industries, geographies, and leave scenarios has the tool supported?	Proven use across different workforce sizes and leave complexities can indicate whether the solution is ready for broader adoption.	

Which leave types and scenarios are supported today, including parental, medical, caregiver, military, company leave, statutory leave, continuous leave, and intermittent leave?	Employers need to know whether the tool can handle the leave situations their employees actually experience.	
What is on the product roadmap, and how frequently are enhancements released?	Understanding future investment helps HR assess whether the tool can keep pace with evolving employee expectations, regulations, and employer needs.	
What functionality is standard today versus custom, manual, or dependent on future development?	Clear distinction between available and aspirational capabilities helps avoid misalignment during purchasing, implementation, and stakeholder communication.	

E – Employee Experience

Question / Evaluation Item	**Why This Matters**	**Notes / Follow-Up**
What will employees experience when they use the tool for the first time?	Leave is often stressful and unfamiliar; a clear, intuitive experience can reduce confusion and increase confidence.	
Does the tool explain eligibility, pay replacement, job protection, timing, documentation, and next steps in plain language?	Employees need practical guidance, not just policy language, to understand how leave may affect their income, job status, and planning decisions.	
Can employees model different scenarios, adjust assumptions, and see how changes affect their estimated leave plan?	Scenario planning helps employees understand options before they formally request leave or engage HR.	
How does the tool support complex or personalized situations, such as overlapping benefits, intermittent leave, multiple jurisdictions, or changes in expected return-to-work dates?	The value of a leave planning tool depends on its ability to provide useful guidance beyond simple, straightforward cases.	

Is the experience accessible, mobile-friendly, multilingual where needed, and aligned with the employer's communication style?	Accessibility and ease of use directly affect adoption, employee trust, and the consistency of the leave experience.	

A – Architecture and Data

Question / Evaluation Item	**Why This Matters**	**Notes / Follow-Up**
What systems must connect to the tool, including HRIS, payroll, timekeeping, benefits administration, leave administration, carrier, or TPA platforms?	Leave planning depends on accurate, timely data from multiple sources; disconnected systems can create errors, manual work, employee confusion, and reliance on internal or third-party technology resources.	
What data will be exchanged through APIs, data feeds, file transfers, single sign-on, or manual inputs?	The integration approach affects implementation timeline, maintenance effort, security review, and long-term reliability.	
Which employee data elements are required, such as employment status, work location, salary, schedule, tenure, leave balances, benefit elections, or demographic indicators?	Employers should confirm that only necessary data is shared and that data availability supports accurate outputs.	
How are company-specific policies configured, especially when rules vary by population, location, bargaining unit, employee class, or benefit plan?	Accurate configuration is essential for consistent guidance and reduces the risk that employees receive incomplete or misleading information.	
Does the tool provide real-time or near-real-time visibility into used and remaining leave, pay estimates, and status changes?	Timely information can support better planning, but HR should understand limitations if data is delayed or dependent on another system.	
What safeguards protect sensitive employee, medical-adjacent, compensation, and leave-related data?	Leave planning involves sensitive information, making privacy, role-based access, encryption, audit trails, and data retention requirements critical.	

V – Vendor, Value, and Verification

Question / Evaluation Item	Why This Matters	Notes / Follow-Up
What responsibilities belong to the vendor, carrier, TPA, employer, broker, consultant, or internal HR team?	Clear ownership is needed for policy accuracy, implementation tasks, communications, updates, issue resolution, and ongoing governance.	
How does the vendor verify that policy rules, eligibility logic, pay estimates, and employee-facing outputs are accurate?	Employers need a defensible process for validation, testing, approvals, and periodic review.	
What implementation support is provided, including project management, configuration, testing, training, communications, and launch planning?	Even strong technology can underperform if the implementation process lacks structure, accountability, and stakeholder engagement.	
What reporting, dashboards, analytics, and administrative tools are available to HR and benefits teams?	Reporting can help HR monitor adoption, identify common questions, evaluate outcomes, and support broader absence management strategy.	
What business value should the employer expect, such as reduced HR inquiries, improved employee understanding, better consistency, faster case preparation, or stronger vendor coordination?	Defining value upfront helps justify investment and establish success measures.	
Which metrics should be reviewed after implementation?	Employers should track adoption, employee satisfaction, inquiry volume, escalation trends, case accuracy, utilization patterns, and administrative efficiency to determine whether the tool is delivering expected results.	

E – Ethics, Compliance, and Enablement

Question / Evaluation Item	Why This Matters	Notes / Follow-Up
How are employees informed about what data is being collected, how it will be used and who will have access to it?	Transparency about data collection and use builds employee trust, supports informed consent and helps ensure compliance with privacy laws and ethical standards.	
How does the tool stay current with federal, state, local, and employer-specific leave requirements?	Leave requirements continue to change, and outdated rules can create compliance exposure and employee confusion.	
How transparent is the tool about the assumptions, rules, calculations, and limitations behind the guidance employees see?	Transparency helps HR explain outputs, set expectations, and avoid overreliance on estimates.	
How does the tool clarify that planning outputs are estimates or guidance, not formal leave approval, claims determination, or legal advice?	Employers must reduce the risk that employees misunderstand planning results as final decisions.	
Has the tool been tested across a broad range of leave types, employee situations, family structures, work arrangements, and workforce populations?	Broad testing can help identify gaps, bias, confusing language, or scenarios that may not be adequately supported.	
What customization is available for branding, messaging, employer policies, support resources, escalation paths, and employee communications?	Customization can improve adoption and alignment, but too much customization may increase complexity and maintenance burden.	

What training and enablement will HR, managers, employees, and vendor partners receive?	Effective rollout depends on clear communication, role-specific training, and alignment on how the tool fits into the broader leave process.	