Technology can make your absence dreams come true…or it can also be your worst nightmare!

Angie Brown, Darren Keener, & Lindsay Lueken

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Great to meet you!

Angie Brown
First VP, Absence, Disability, & Life
Alliant

Darren Keener
VP, Product Management
Majesco

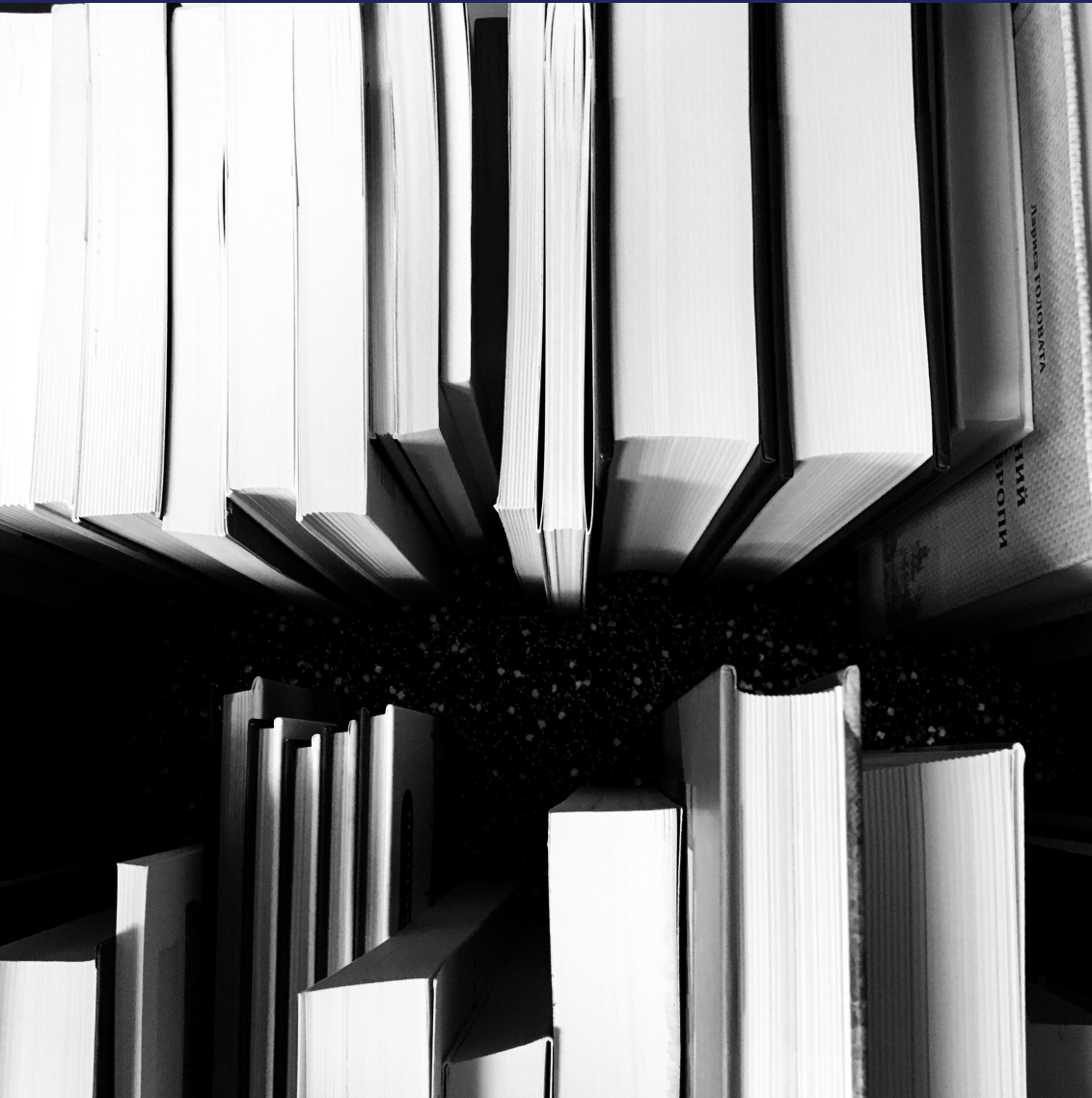**Lindsay Lueken**
VP, Disability & Leave Design
Broadspire

Agenda

- Setting the Scope

- Claim Management

- Employee Experience

- Files & Integrations

- Reporting & Auditing

- Final Thoughts

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Let's Talk about Technology

Setting the Scope

STAY FOCUSED!

Leave and Claim Management systems

- **Insource** – Managed in-house with no specialized tools
- **Co-source** – Managed in-house with specialized leave/claim management platform
- **Outsource** – Management of leaves/claims outsourced to third party

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High Tech = Cutting edge or within reach

Claim Management

Claim Management – Where we are

Low Tech ←——————————————————————————→ **High Tech**

Low

- Excel Spreadsheets
- Manual Communications
- Manual Reminders
- Manual clinical engagement
- No File Automation: Eligibility, Leave Status, Payment
- Risk of poor or no record retention

Medium

- Non-specialized software
- General communication suite
- Limited reminders
- Limited clinical coordination
- Limited case management assignment
- No File Automation: Eligibility, Leave Status, Payment
- Low records retention

High

- Disability / Absence software
- Robust communication suite, potential for custom suite
- Automated standard and custom reminders
- Embedded clinical guidance
- Custom case triage assignment
- Potential for File Automation through SFTP and/or API
- Optimal records retention

Claim Management – Where we're headed

Benefits

- Scenario based communications, reminders, SMS

- Weekly/Daily/Real-time data transfers

- Interconnected ecosystem

Cautions

- Workflow programming requires clear scoping and rules

- Temptation to Over Engineer for the minority scenarios

- Testing, Monitoring, Change Management Tracking

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Employee Experience

Employee Experience – Where we are

Low Tech → ← → High Tech

Low

- Increased risk for delayed or inaccurate communications with unclear direction
- Increased risk for inaccurate entitlement and eligibility management
- Inconsistent decision timeliness
- Manual payroll coordination results in employee pay errors
- No portal or SMS capabilities

Medium

- Consistent and compliant process for FMLA and STD
- Timely initial decisions for happy-path claims
- Inconsistency or delays for variable scenarios leading to employee confusion
- Inconsistent payroll integration, manual for non-happy path
- Limited portal or SMS capabilities

High

- Consistent, compliant process aligned with unique absence
- Real-time communications and SMS based on claim scenario
- Real-time interactive portal and SMS capabilities
- Automates accurate pay for employee on leave
- Planning Tools & Chat   Features

Employee Experience – Where we're headed

Benefits

- Claim-specific guidance for all aspects, including automated communications, SMS, and portal experience

- Ability to communicate and review claim through preferred modality

- Increased self-service tools with improved accuracy of detail

Cautions

- Leave Planning tools and Chat Bots have limitations based on configurations

- Employer participation in communication materials required

- Removing the human touch, making it too transactional

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Files & Integrations

Files / Integrations – Where we are

Low Tech   High Tech

Low

- Cumbersome and time-consuming
- Manual entry into leave/claim management system
- Manual data entry errors
- Missing information

Medium

- Automated transmission
- Batch process, typically weekly
- Fewer data errors
- More difficult to correct

High

- Automated transmission
- Higher frequency, daily to real-time
- Data warehouses becoming more common
- AI troubleshooting

Files / Integrations – Where we're headed

Benefits

- Advanced API-based integrated solutions

- Real-time data transfer

- Interconnected ecosystem

Cautions

- Immediate spotlight on processing

- Automatic downstream impact

- More / better monitoring

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Reporting & Auditing

Reporting & Auditing – Where we are

Low Tech   High Tech

Low

- Limited reporting capabilities for single systems
- Limited analytics tools
- Time-consuming to create, analyze, and take action
- Random sample manual audits

Medium

- Solutions like Tableau & PowerBI
- Ability to aggregate data a limiting factor
- Still relies on human manipulation and interpretation

High

- Rise in data warehouses aggregating data
- AI enables natural language query-based reporting
- AI-based trend identification
- Agentic AI auditing solutions

Reporting & Auditing – Where we're headed

Benefits

- Data warehouses provide stronger reporting foundations
- Applying AI simplifies query-based reporting & can identify hidden trends
- Agentic AI auditors will allow 100% claim auditing

Cautions

- Data warehouses often require significant investment & architecture
- Agentic AI auditors will still require human oversight
- Transparency into AI reports & audits

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Final Thoughts

Final Considerations

Organizational Culture

What is the purpose?

Technology Strategy

What is your plan?

Human in the Loop

What is your process?

Governance

How do you measure success?

Build vs. Partner

How will you get to your goal?