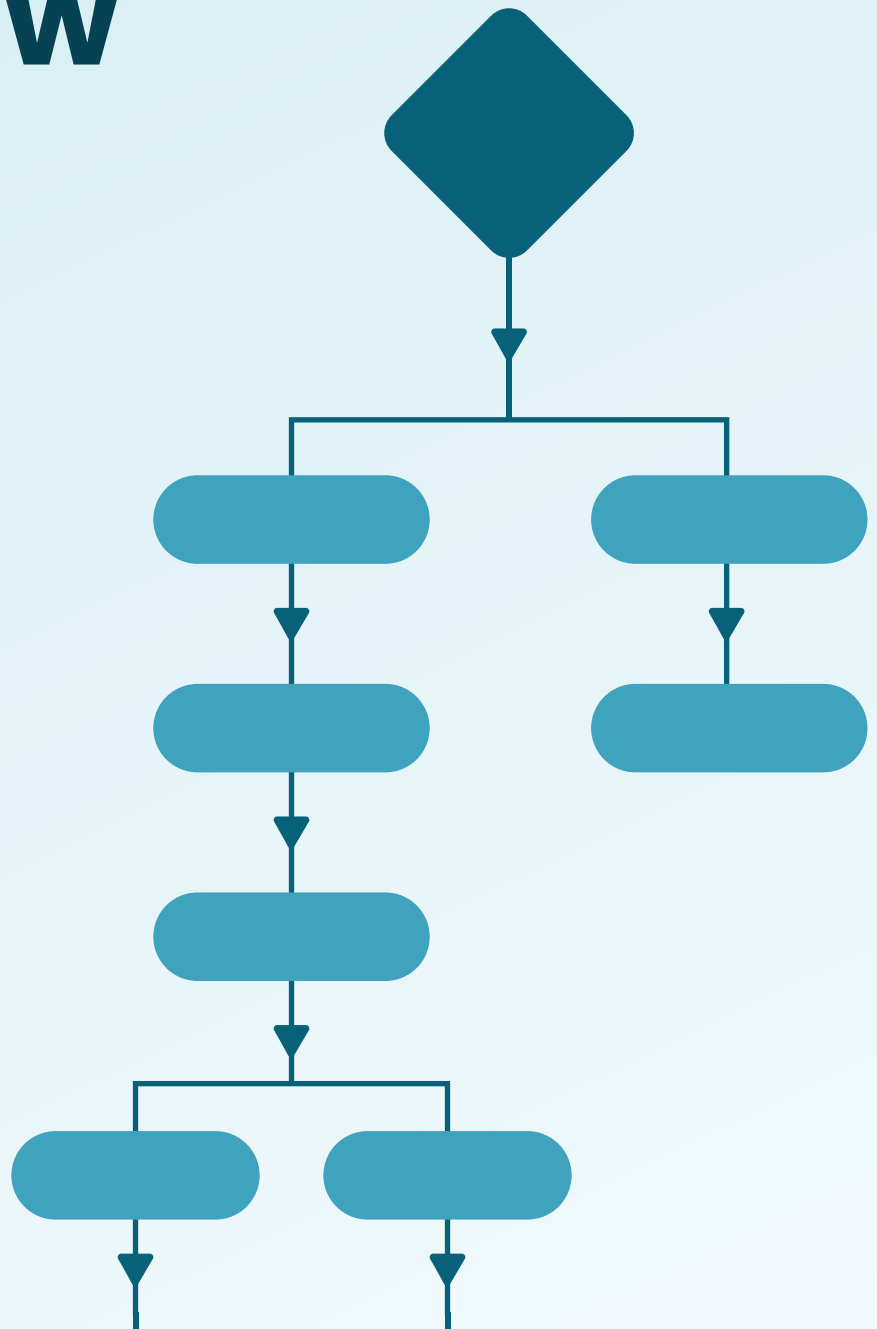


Turning Your FMLA Process into an Automated Workflow



Reimagine Your FMLA Journey

This workbook is your guided tool to document, reflect, and start building a better FMLA process. The goal is to reimagine your process with technology and automation to drive a better experience for you, your team, and the employees you support. We'll walk through four critical phases of FMLA administration: intake, eligibility and entitlements, communications and paperwork, and return to work.

Use this space to capture what you do today, where automation and technology can help, and what you want to take back to your team.

Section 1: FMLA Intake

How do leave requests start today?

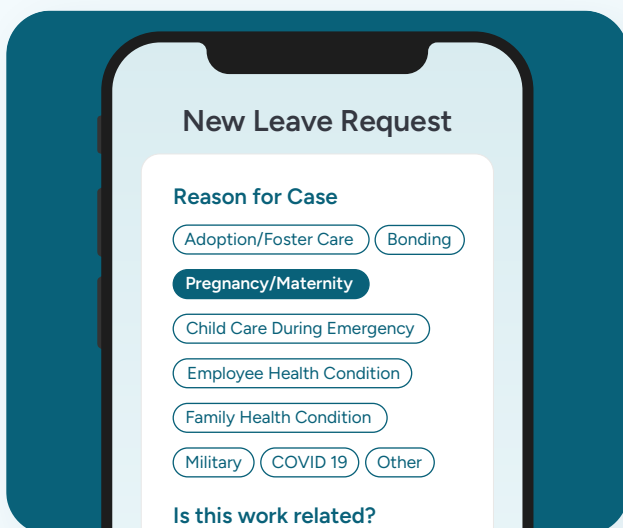
- ▶ How does an employee submit a request?
- ▶ Who receives it, and how is it logged?
- ▶ Do you accept requests via phone, email, or an online portal?

Briefly describe your current intake process:

Think about your current process. What parts of intake take the most time? Are there bottlenecks when a lot of requests come in at once?

What do you do over and over again, the same way?

Where automation could help:



New Leave Request

Reason for Case

☐ Adoption/Foster Care ☐ Bonding

☒ Pregnancy/Maternity

☐ Child Care During Emergency

☐ Employee Health Condition

☐ Family Health Condition

☐ Military ☐ COVID 19 ☐ Other

Is this work related?

Mobile-friendly employee self-service portal, where employees are guided to complete all required information. Managers can access portals to see relevant leave details.



↻ Syncing Employee and Case Data

Martin Garcia

✓ Hire Date: 06/19/2017

✓ Phone Number: 123-456-7890

✓ Work Email: MGarcia@company.com

↻ Address:

If a request comes in directly, HR can open a case in just a few clicks with a leave platform. Employee information is pre-filled through integrations with systems of record.

Section 2: Eligibility and Entitlements

How is eligibility calculated today?

- ▶ Who checks FMLA eligibility criteria?
- ▶ How do you handle rolling 12-month calculations?
- ▶ Do you track leave usage manually?
- ▶ How is intermittent leave tracking handled?

Briefly describe your current tasks and processes:

**Think about your current process. What is difficult about getting full eligibility criteria for every employee in your workforce?
Are employees eligible for more than FMLA?**

What is the hardest part about tracking intermittent leave usage? What takes the longest time, or is the hardest to update?

Where automation could help:

Policy	Eligible
Family Medical Leave Act	Yes
Oregon Family Leave - Pregnancy/Maternity	Yes
Oregon Paid Leave	Yes
Oregon Paid Leave - Job Protection	Yes
Oregon Family Leave	Yes
ABC Company Parental Leave	Yes

Real-time eligibility calculations for not just the FMLA, but also 200+ state leave laws. Ideally, this is powered by a core engine in the platform, informed by in-house experts and legal partnerships.

Time Tracker		
Policy	Time Used	Time Available
<div></div>	2.00 weeks	10.00 weeks
<div></div>	0.00 weeks	6.00 weeks
<div></div>	0.00 weeks	2.00 weeks
<div></div>	0.00 weeks	2.00 weeks
<div></div>	0.00 weeks	6.00 weeks

Entitlement amounts and usage are instantly calculated and automatically tracked. Time remaining is updated as requests come in and are approved.

Section 3:

Communications and Paperwork

How do you handle notices and forms?

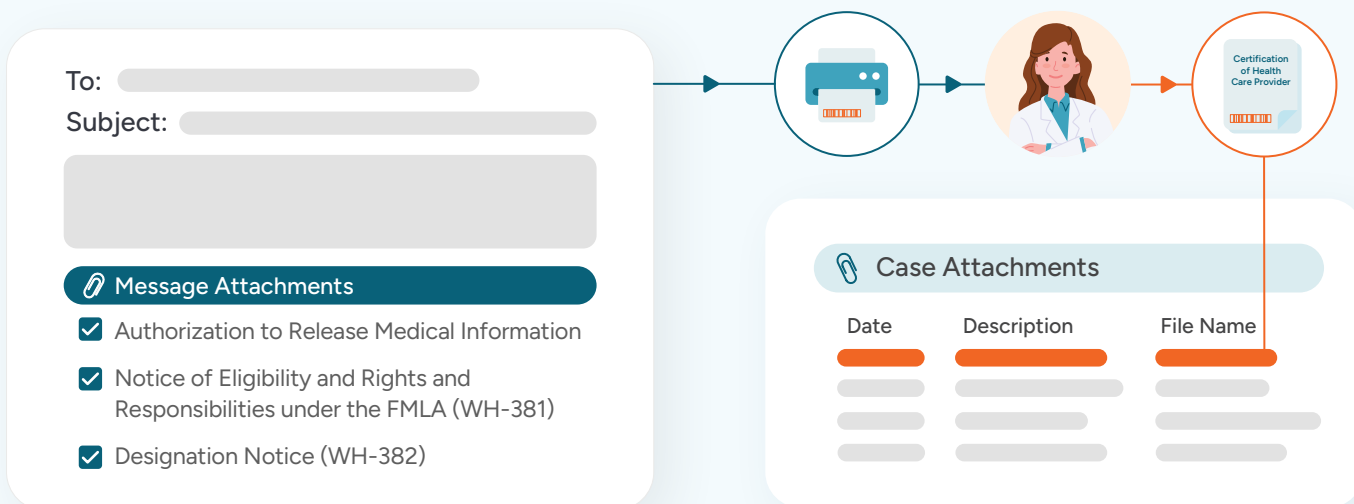
- ▶ Who sends Rights & Responsibilities and Designation Notices?
- ▶ How quickly do they go out?
- ▶ Is the process different for intermittent vs. continuous leave?

Briefly describe your current processes for forms and communications:

Do you have any repetition in this process, like copying and pasting the same text in an email or Word Doc? Are you locating and attaching the same forms again and again?

How do you remind employees to return their forms? What slows the process down the most when it comes to FMLA forms and paperwork?

Where automation could help:



FMLA packets and notifications can be pre-generated and automatically attached to templated communications. Personalization is still possible, but you start with pre-generated, compliant communications.

Paperwork can be simplified with fax barcoding, where incoming faxes go directly to the platform and are attached to a case. With bi-directional texting, employees can also text photos of paperwork to save time.

Section 4: Return to Work (RTW)

How is RTW tracked and supported?

- ▶ How do you know when someone is scheduled to return to work?
- ▶ Who checks for medical releases?
- ▶ What happens if accommodations are needed?

Briefly describe your current return to work processes:

What are your biggest challenges and slowdowns with your current return to work process? Are managers, IT, and other stakeholders notified proactively?

If an employee needs an accommodation to return to work, how are those requests tracked and managed?

Where automation could help:

To: IT Team

Subject: Grace Nielson's Return to Work

Good Morning,

Grace Nielson will be returning to work on Monday, January 13. Please restore all building and technical access prior to her arrival.

Thank you!

Case Activity

3/15	Send Eligibility Notice
6/13	Interactive Process
6/11	Mgr. Communication
6/11	Accommodation Requested

Return dates are automatically tracked for each request. Automated notifications can be sent to managers, IT, systems administrators, and more to ensure access is restored on time.

With a platform that manages both the FMLA and the ADA in one system, you can easily manage and move between entitlements on a single case.

My Automation Opportunities

Use this summary chart to capture where your biggest wins might be.

Process Step	What I Want to Change
Intake	
Eligibility	
Entitlements	
Communications	
Paperwork	
Return to Work	
Other	

Ready to talk about what automation could look like for your process?

We are here to help at **absencesoft.com**.