

# Multistate PFML Private Plan Implementation Timeline

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AUGUST 4-7 • WASHINGTON, DC

# Speakers



**Simon Klarides**, CPCU, ARM

Simon is a versatile business development executive with over 25 years of experience driving strategic growth, revenue expansion, and operational excellence across group benefits and P&C insurance markets. Over the past 16 years with ShelterPoint Life, he has become a trusted national resource in Paid Family and Medical Leave (PFML) products.



**Sarah Coli**, Esq.

Sarah Coli, Esq. works with cross-functional internal teams to implement paid family and medical statutory policies in emerging market states. In conjunction with state and national trade associations, she works with legislators and insurance and labor regulators to help stand up new statutory programs and help to ensure the programs' continued success and maintenance.



**Rebecca Hanna**, CLMS, ADMS

Rebecca is Lead Associate of Product Management at ShelterPoint Life Insurance Company, focusing on state-mandated paid leave. Working in the insurance industry since 2006, she has held a variety of roles spanning operations, IT, claims, and most recently, product.

# Travel Itinerary



Phase 1 - Plan Your PFML Trip!



Phase 2 - Ticketing/Pre-Boarding



Phase 3 - The Journey



Phase 4 - Destination



Phase 5 – Looking Back On Your Journey



# Phase 1- Plan Your PFML Trip!

- Reservations required!
- Timing for beginning the planning process
- Stakeholders in the Planning Process

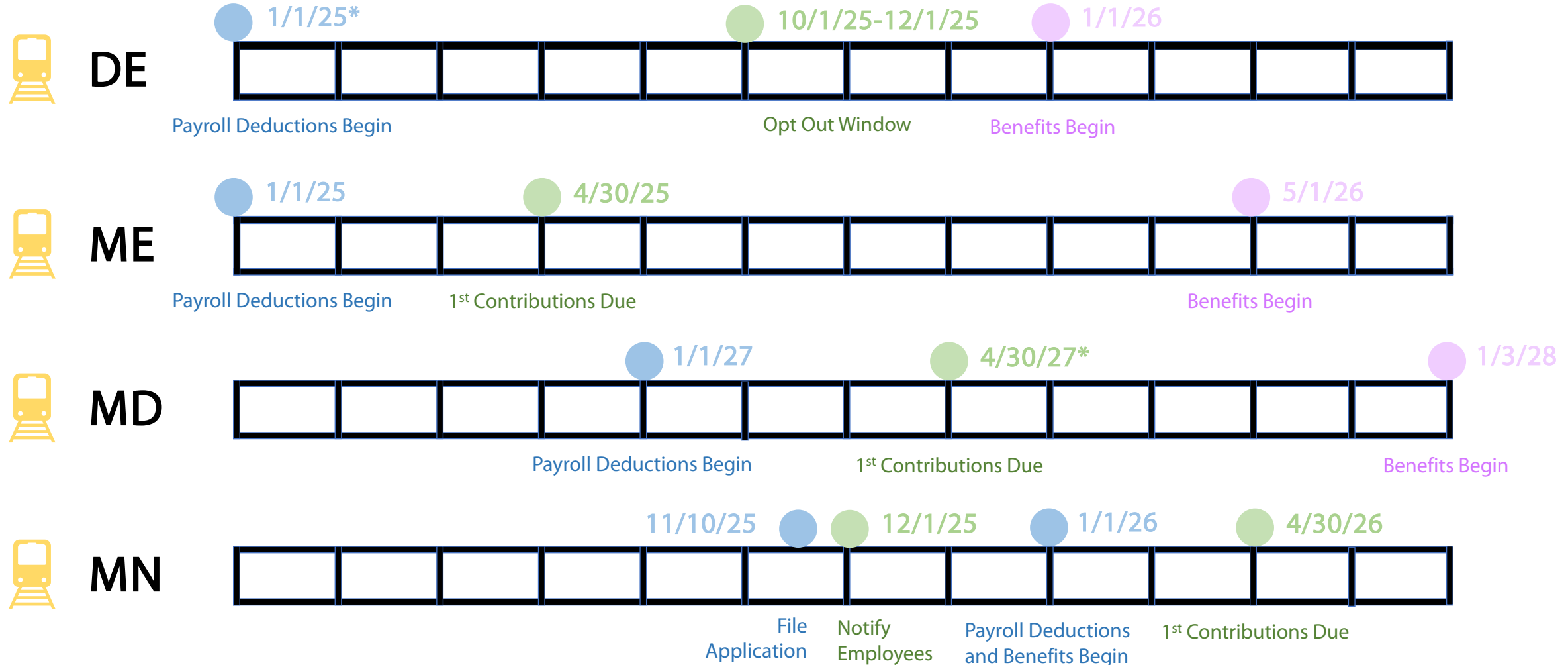


# Phase 2- Ticketing/Pre-Boarding

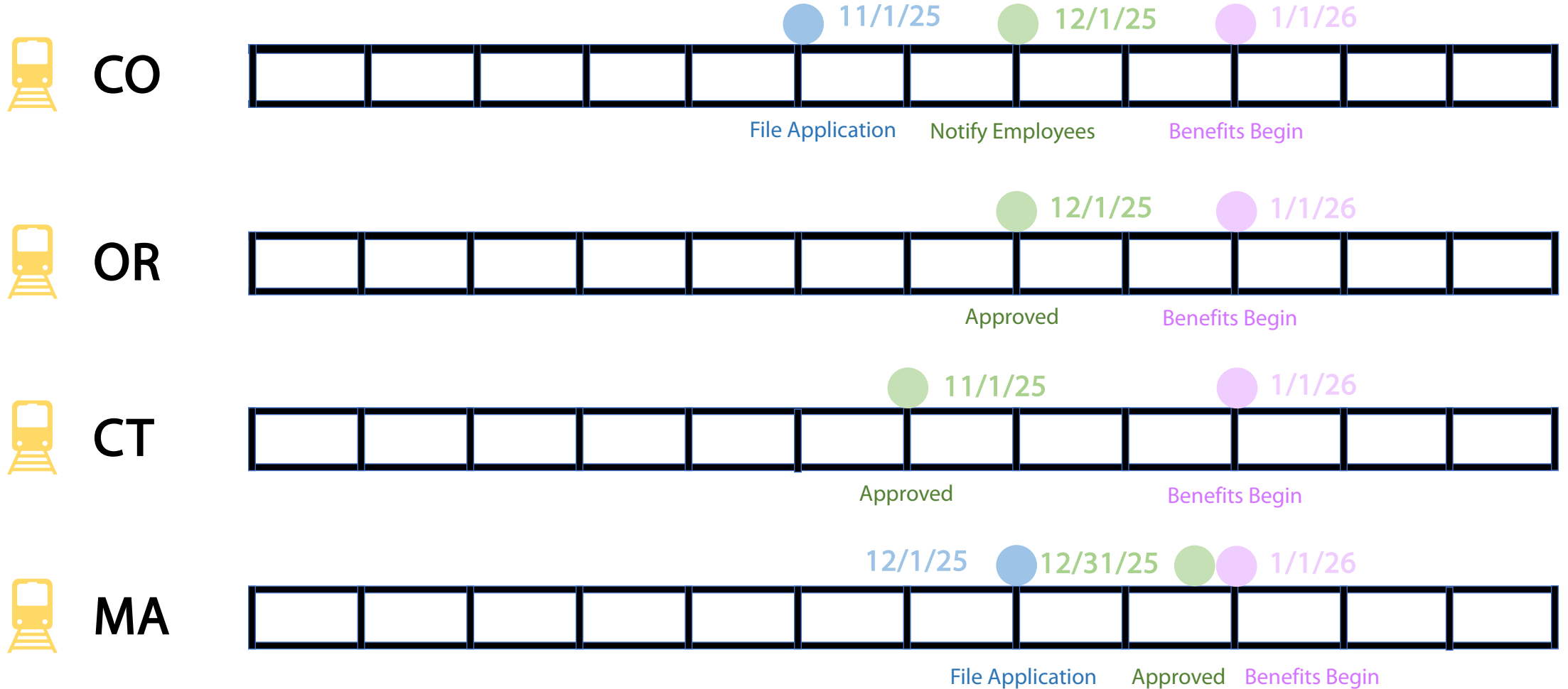
- Kicking it off
- Finding the right “Fit” (insource/outsource, self-insure/fully insure/State plan, other leave admin)
  - Funding
- Creating awareness
  - CT – Vote
  - Policies & Procedures
  - Notices
- Gathering requirements
  - Subsidiaries/M&A's, Expansion plans
  - Integrations



# Phase 3- The Journey



# Phase 3- The Journey (continued)



# Phase 3- The Journey (cont.)

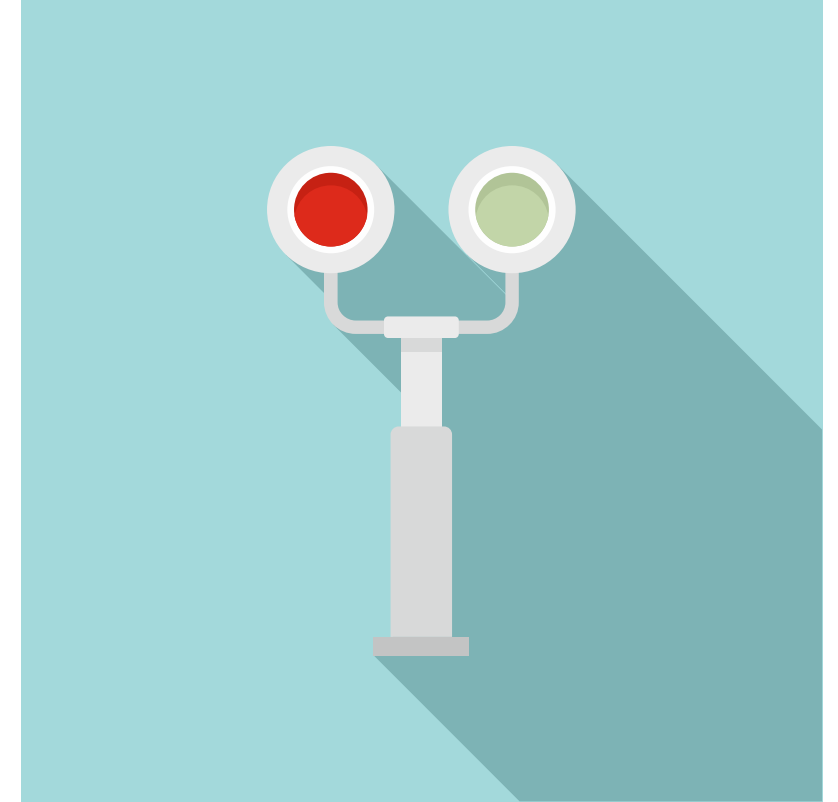
- Major steps
  - Employee notifications
    - E.g. CT vote
  - Application process & deadlines
  - Required forms & signatories
  - Fees/approval timelines
  - Submission process





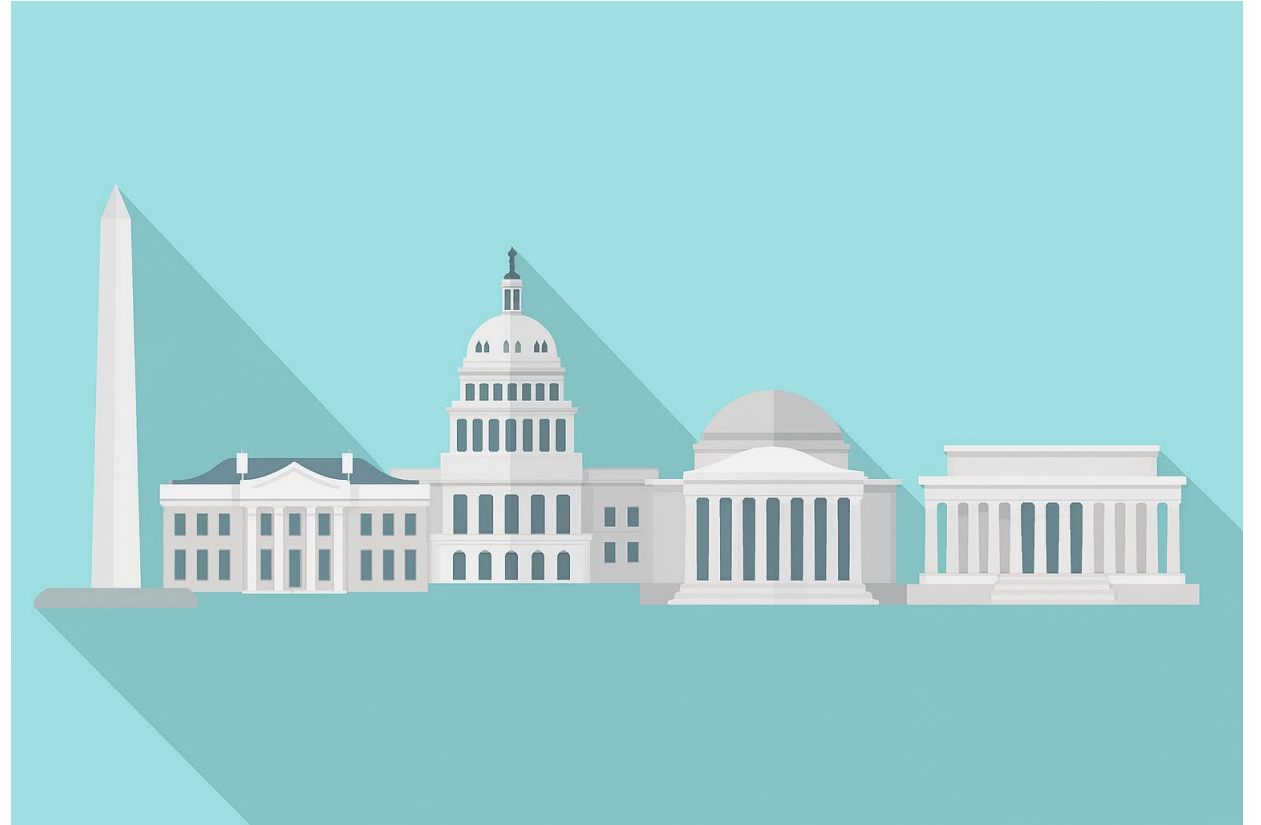
# Phase 4- Destination

- Employee Communications
- System Updates
- Roles and Responsibilities
  - ER is ultimately the Private Plan holder and bears responsibility.
  - Reporting (claims vs. wage/contributions. Vs. premium/tax- your Carrier may do some reporting on your behalf)
  - Recertifications
    - Annual: CO (annual attestation), MA, OR (annual the first 3 yrs)
    - Other : CT; 3 yrs, requires new app and vote.
  - Maintaining PP contact info
  - Ongoing Notice requirements (Annual, New EE, Event-triggered)



# Phase 4- Destination (continued)

- Metrics/KPI's



# Phase 5- Looking Back on Your Journey

- Recap all the stops along the way towards PFML implementation
- Conduct a self-assessment: what went well, what can be improved for next time



# Questions?



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