

ABSENCE NAVIGATOR

TOTAL ABSENCE MANAGEMENT



AGENDA

- **Introductions**
 - Client Team & C2 Total Absence Management Team
- **Discovery Goals & Objectives**
 - Current Program, Process and Challenges, Desired Future State
 - Absence Advisor Services Needed
- **Overview of Absence Navigator Services**
- **Questions & Next Steps**
- **Appendix**
 - Details for Absence Navigator
 - Insourcing and Outsourcing Pro's and Con's

Discovery Topics

- Overview of current leave and ADA process
- Internal HR team and Payroll
- External Partners (Insurance Carriers, Benefits Administration, HCM Systems)
- Technology Integration
- Legal and Compliance Resources
- Pay policies and administration
- Employee Experience
- Managers and Supervisor Experience
- Reporting and Utilization

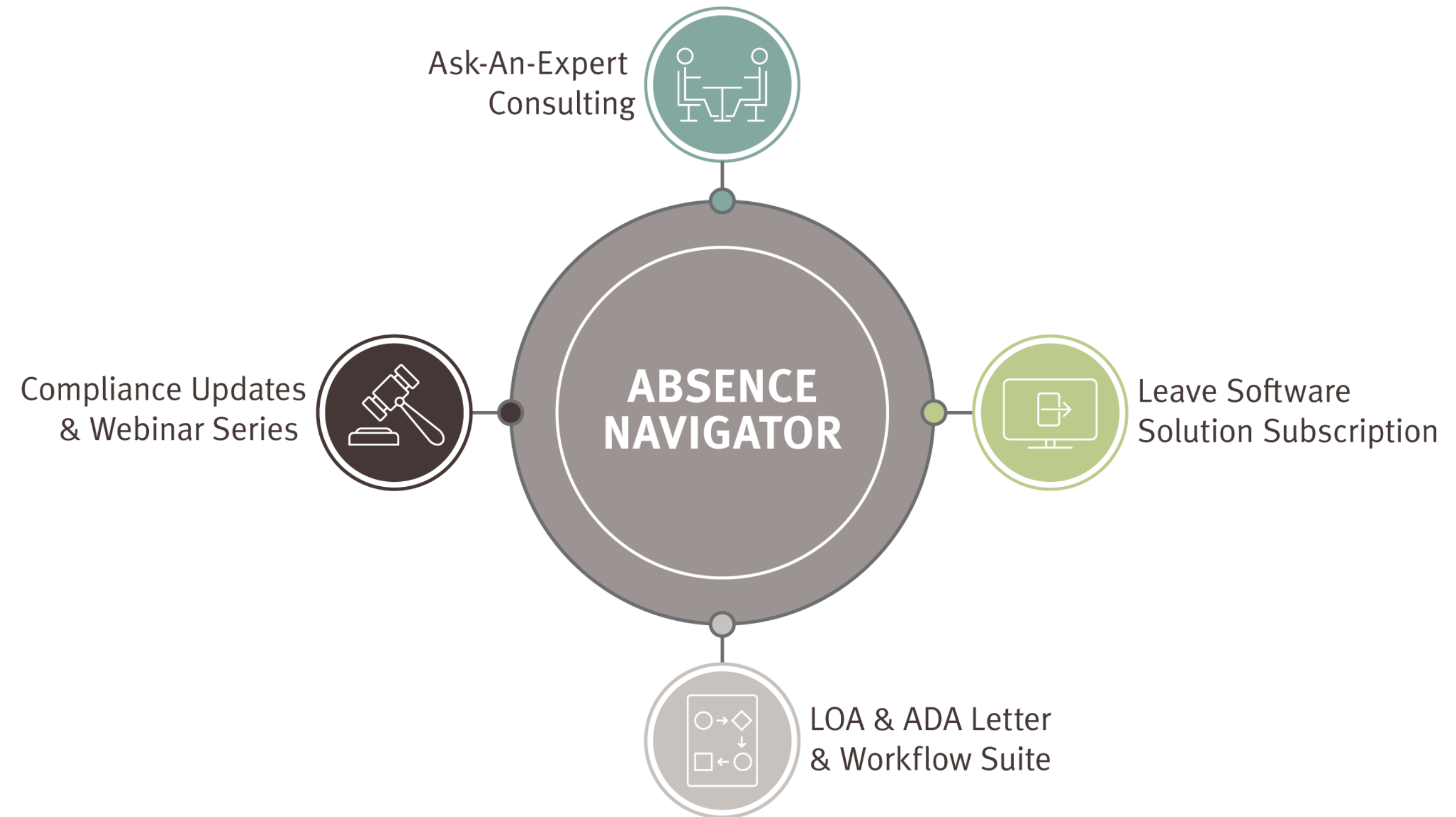


WHY ABSENCE NAVIGATOR

Bundle of Set Services

- 4 Easy-to-Use Tools
- Fast and Easy Implementation - 45 days or less
- Quick access to a Leave/ADA Subject Matter Expert
- Leave Administration Software Solution (no data feed required)
- Strengthens your Leave and ADA Compliance
- Provides Internal Workflows, Letters and Best Practices
- Low cost solution

ABSENCE NAVIGATOR



APPENDIX





ABSENCE NAVIGATOR DESCRIPTION OF SERVICES



ASK-AN-EXPERT CONSULTING

12 hours of Ask-An-Expert consulting per month

- Take advantage of the opportunity to run both the mundane and challenging Leave and ADA scenarios by our team of experts

Client Question Examples

- “I received the below email (email omitted) from one of our employees that has questions about eligibility for OFLA with the change in schooling and FMLA for the therapy appointments. I wasn’t sure about OFLA for the change in school, she mentions COVID for school and day care, but am not sure if this need would qualify for OFLA and the therapy appointments for FMLA. I am thinking this I would have the provider fill out the med cert and go from there.”
- “We received a call from one of our practice managers, she has a pregnant employee due in December. This employee has made a few comments that she is not sure she will be returning after maternity leave. The practice manager wants to know as soon as possible if the employee is not planning on returning. If we do know that she does not have plans on returning, are we at that point not obligated to provide a protected leave? At what point would we end employment?”

LEAVE SOFTWARE SUBSCRIPTION

A simple and secure cloud-based web application designed to help guide our clients to make the right decisions when faced with a request for leave



Stay Compliant

Stays up to date with more than 500 federal, state, and local leave laws



Eligibility & Entitlement

Automatically determines an employee's eligible leave policies and tracks entitlement balances until they return to work



Generated Leave Forms

Generates all the regulatory leave forms you need to send to employees – no need to search



Centralized Leave Information

Stores information on all your employees, their leave requests, and important case details

LEAVE OF ABSENCE & ADA LETTER SUITES AND WORKFLOWS

LOA & ADA Letter Suites

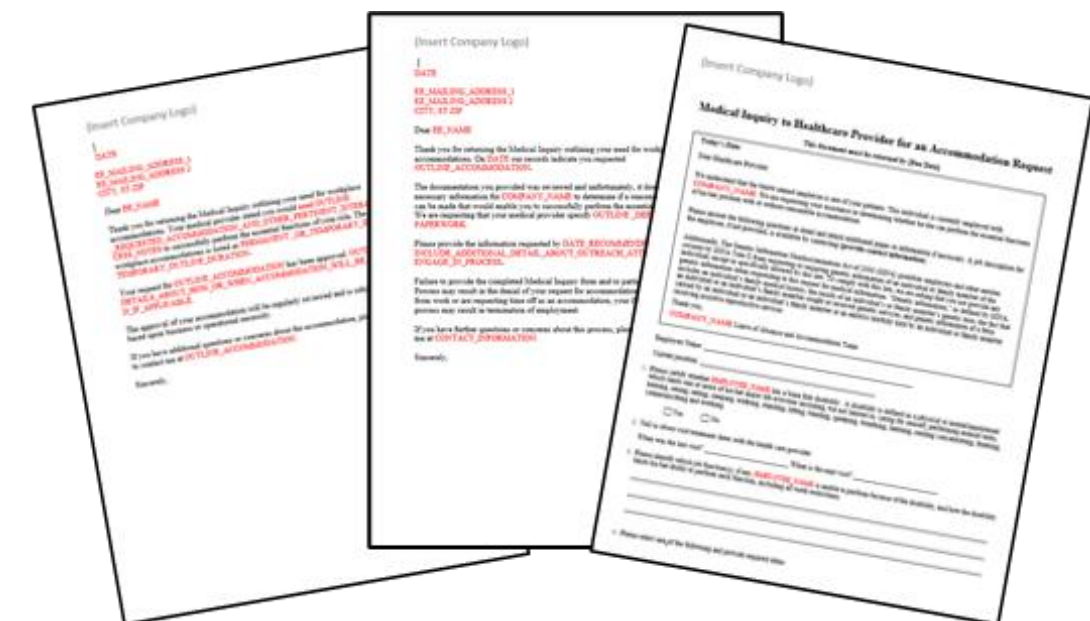
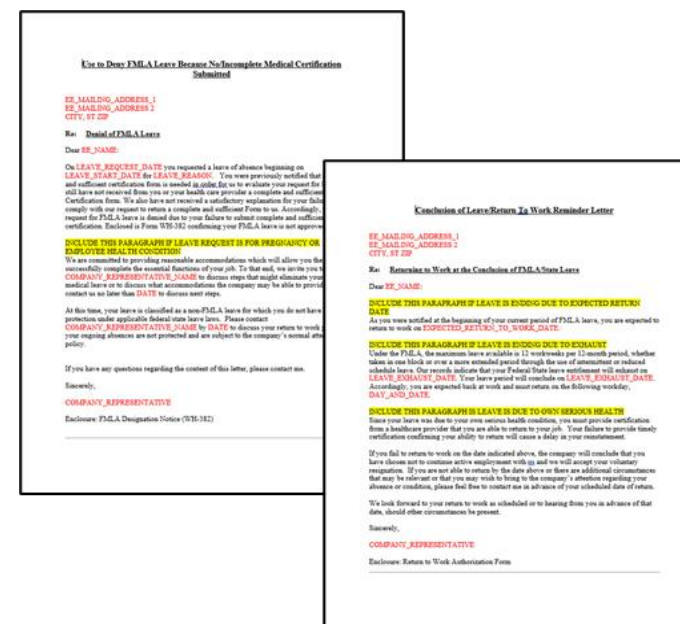
- We provide you with the foundation of our suite of letters and workflows for leaves and workplace accommodations that will guide you through the process

Suite of FMLA Letters

- Leave Request Form
- Notice of Eligibility Rights and Responsibilities
- Approval Letter
- Denial Letters
- Leave Extensions
- Insufficient Medical Certification
- Return to Work and Leave Ending Letters
- AND MORE!

Suite of ADA Letters & Tracking Tool

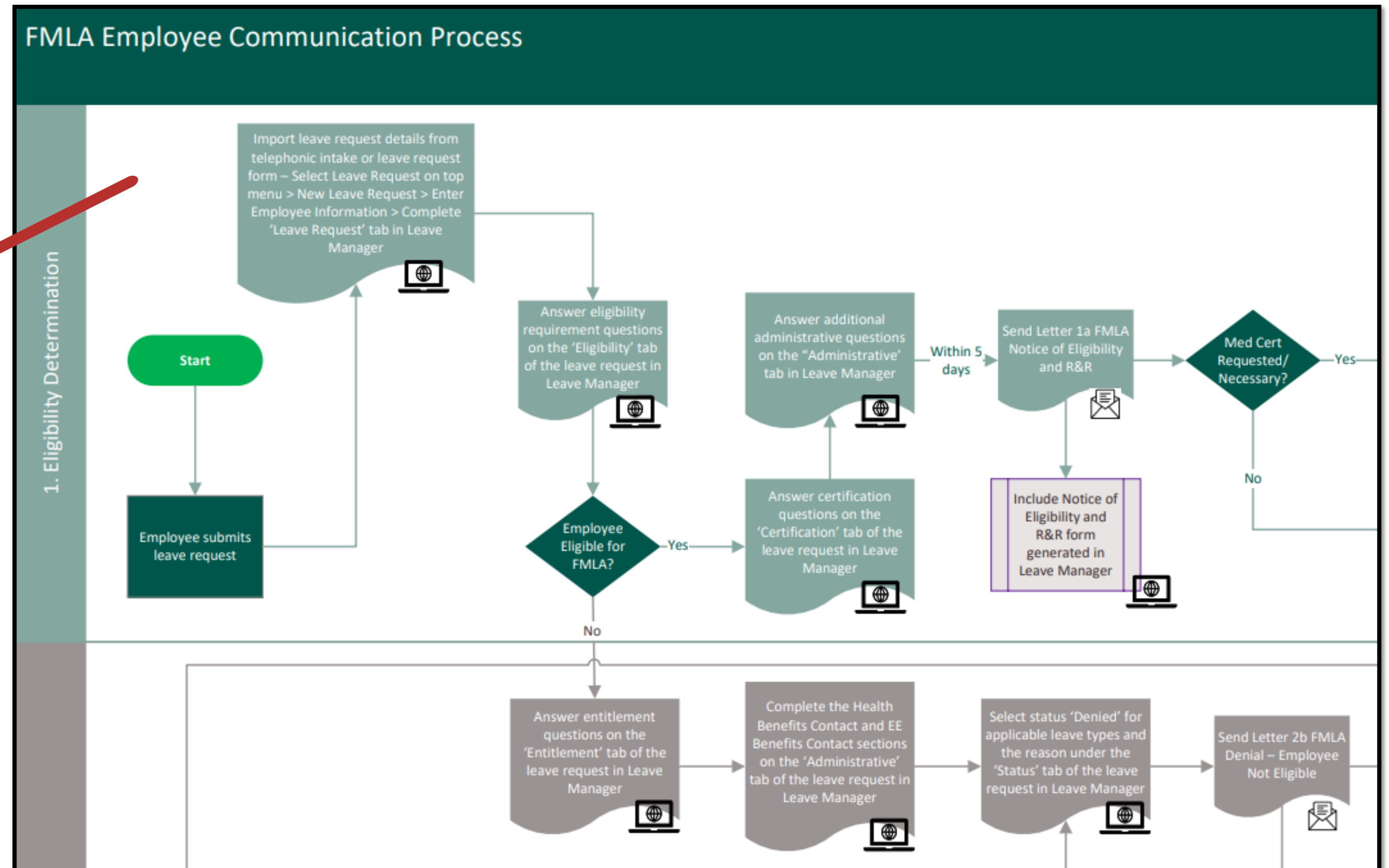
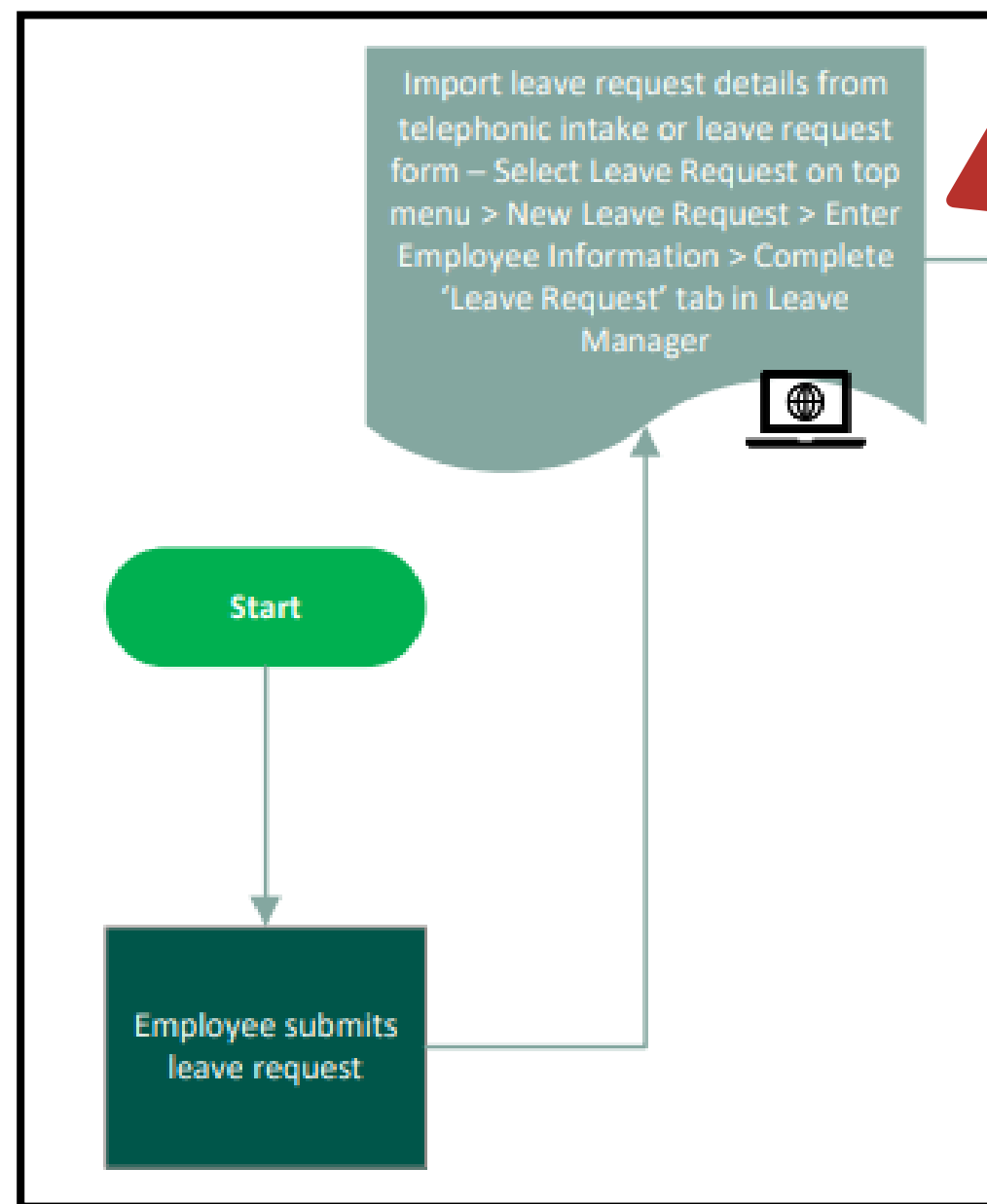
- Initial Packet (General and California)
- Reminder Letter
- Medical Inquiry Insufficient Letter
- Accommodation Approval Letter
- Accommodation Denial and Case Closure Letters
- Tracking Template to monitor statuses and requests



LEAVE OF ABSENCE & ADA LETTER SUITES AND WORKFLOWS

LOA & ADA Workflows

- Workflows that correspond with letter suites as well as your leave software



COMPLIANCE UPDATES & NEWSLETTER

Exclusive access to our regular compliance updates, newsletters, and webinars – these will be a one-stop shop for the most significant case law developments, federal and state legislation, and regulatory changes

ABSENCE MANAGEMENT NEWSLETTER

- Delivered via email quarterly to all Absence Navigator clients



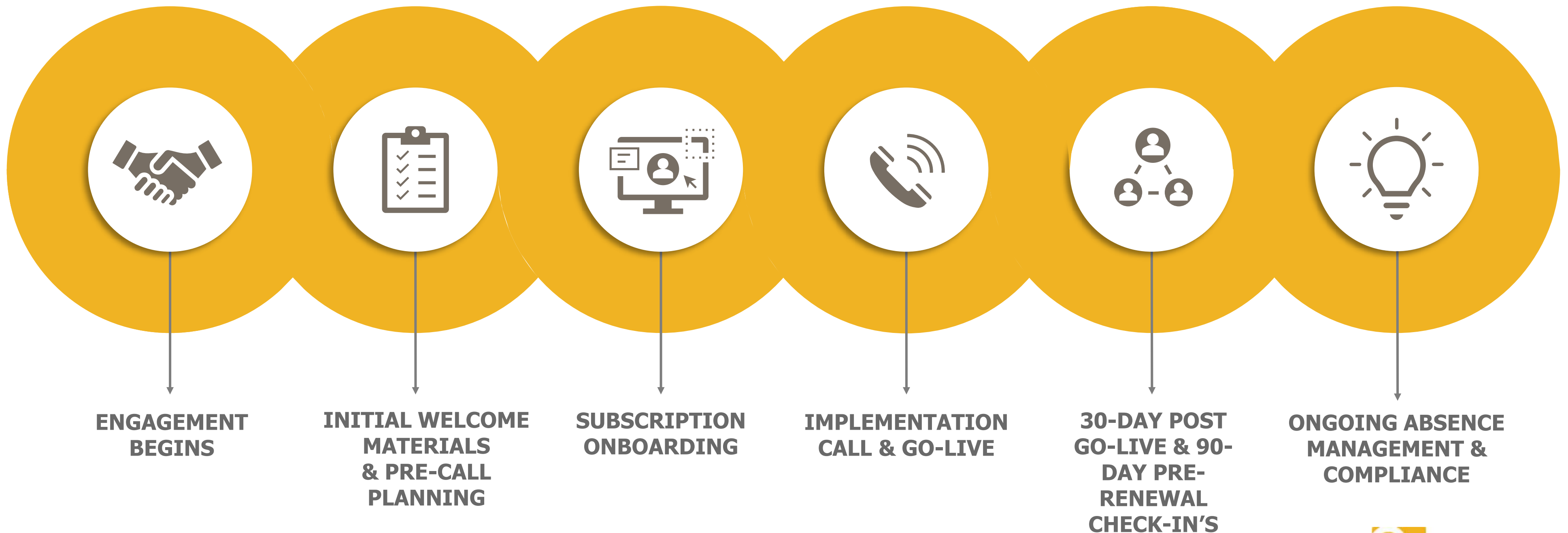
Compliance Corner

The Total Absence Management Team (TAM) at The Partners Group is excited to introduce our new quarterly compliance newsletter. Featured content will include leave and disability state and federal legislative updates, case law, and announcements on helpful webinars, conferences, and so on.

STATE PAID FAMILY & MEDICAL LEAVE AND DISABILITY GUIDE & LEAVE BENEFIT CALCULATOR

- A comprehensive guide outlining many of the critical elements such as weekly maximums, leave reasons, duration, notification requirements and job protection
- We regularly review each state's program and will issue updates to the guide as applicable
- Access to our web-based Leave Benefit Calculator tool that provides an estimated employee weekly PFML benefit amount, it can provide an estimate for every state that has a PFML benefit available to employees

CLIENT IMPLEMENTATION ROADMAP





FAQ

How quickly can you implement Absence Navigator?

A: 45 days or less.

How many users can have access to system ?

A: System allows unlimited users throughout organization; however, they can only set up one username. We recommend setting this up as a general HR username to share.

Does leave system require a demographic file feed?

A: No feeds are needed.

Does system have any implementation costs?

A: No. The TAM team will assist with the system onboarding and the initial customization of the system to the specific client.

Can I roll hours for SME?

A: Generally, hours need to be used each year; however, we will provide flexibility when circumstances warrant. TAM has staffed this service assuming hours are used yearly.

Can I use SME hours for special projects?

A: These hours are not intended for project work; they are intended for leave and ADA case questions, compliance inquiries, best practice advisement, and other leave and ADA program related needs. Project work can be scoped and priced separately.

What is the renewal process for Absence Navigator?

A: TAM can align the anniversary date of your benefit plan year. If a desired, we can also accommodate off-anniversary Absence Navigator contract. TAM will provide renewal correspondence 90 days in advance of the anniversary date.

Is the TAM Absence Navigator pricing subject to change?

A: All clients will have a 12-month pricing rate guarantee. If extended rate guarantees are desired, we can provide up to a 3-year contract.

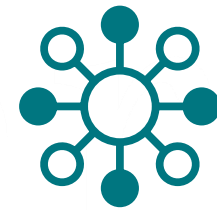
INSOURCING & OUTSOURCING CONSIDERATIONS



ABSENCE MANAGEMENT OPTIONS

INSOURCING VS OUTSOURCING

Insourcing



Software



Internal Staff

Outsourcing



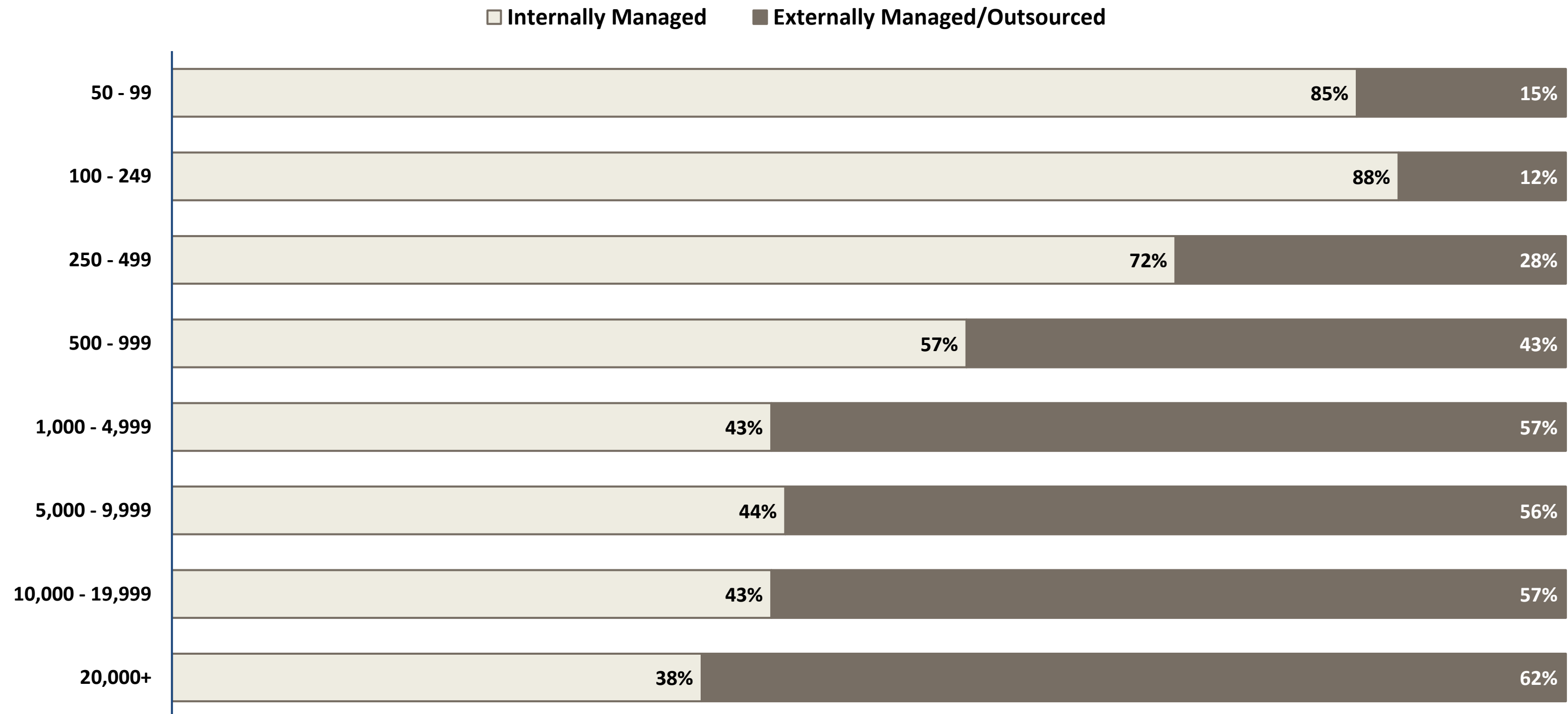
Vendor Partner



External Staff

INSOURCING VS OUTSOURCING BY COMPANY SIZE

Management of Regulatory Leaves by Size*

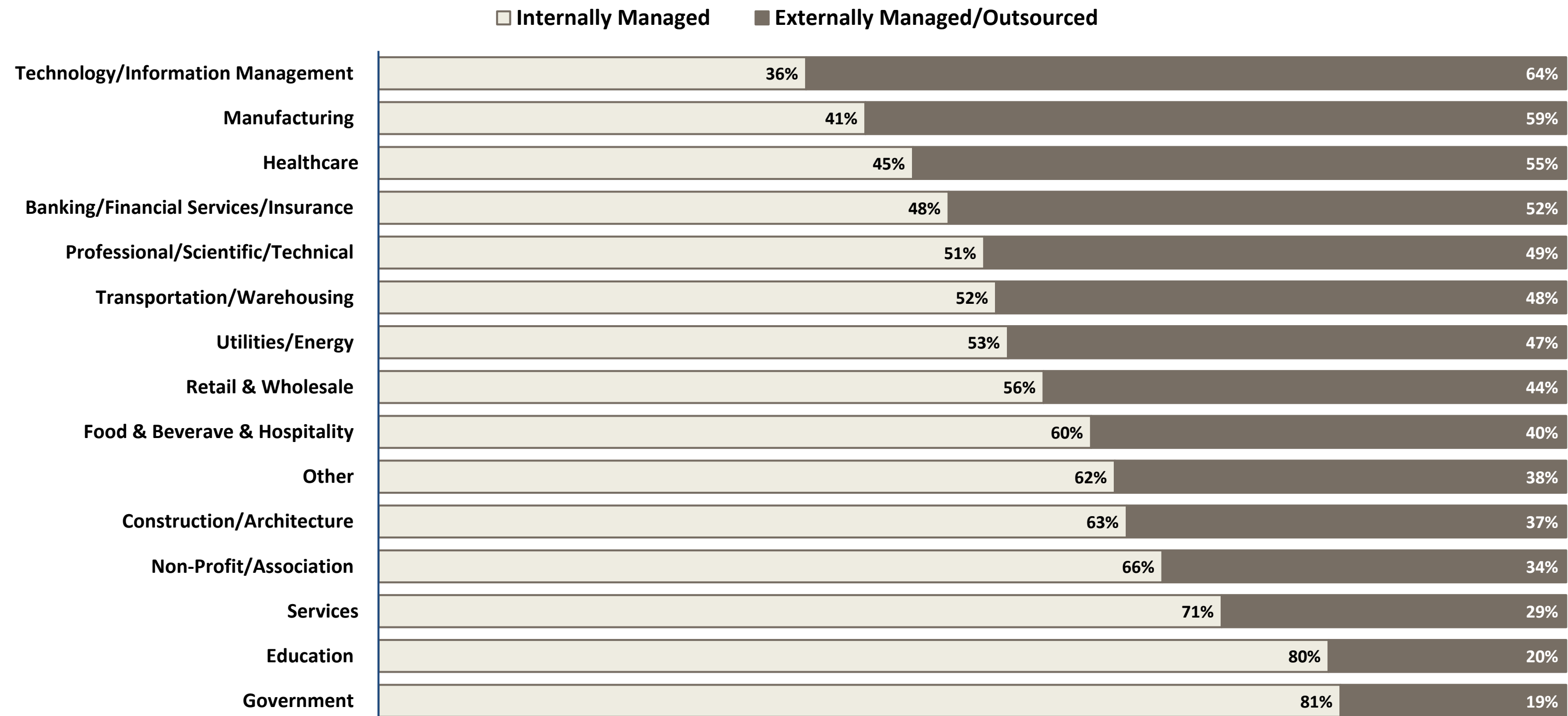


**Percentages are unweighted*

2023 DMEC Employer Leave Management Survey

INSOURCING VS OUTSOURCING BY COMPANY SIZE

Management of Federal FMLA by Industry



INSOURCING CONSIDERATIONS

PROS

Complete control and ability to pivot quickly to address process gaps and employee escalations

Control over all aspects of leave process allows for full information transfer between departments that must touch leave (benefits, payroll, etc.)

Employer maintains control over leave decisions
Employer has visibility into leave abuse/misuse
Software tools can help ensure compliance with federal/state leave laws

Building connections between HR systems and leave system will allow for more automation and efficiencies

Leave technology provides easy access to leave volume dashboards and reporting that helps with capacity planning

Complete control and ability to pivot quickly to address process gaps and employee escalations

Control over all aspects of leave process allows for full information transfer between departments that must touch leave (benefits, payroll, etc.)

EMPLOYEE EXPERIENCE

LEAVE PROCESS EMPLOYER CONTROL

LEAVE ADMIN TECHNICAL SKILLS & COMPLIANCE

STRENGTH OF EXISTING HR TECHNOLOGY

REPORTING

CUSTOMIZATIONS

COST OF SOLUTION

CONS

Resource intensive;
Potential for inconsistent employee experience

Resource intensive/employer must continue to own all internal touchpoints of the LOA process

Employer must invest in hiring and ongoing training to maintain deep regulatory subject-matter expertise

Lack of strong internal systems will mean that insourcing with technology will bring less efficiencies & automation. Internal technology often needs customized and/or altered to pass appropriate information to leave system

Leave technology does not provide higher-level strategic reports - these must be built with custom reporting options

Customizations incur added cost

OUTSOURCING CONSIDERATIONS

	Employee experience is consistent. Vendor brings efficiencies to leave review process	Vendor could take on some (not all) aspects of internal process (HRIS connection, ATP feeds, etc.)	Employer does not need to maintain deep subject matter expertise in-house. Ability to rely on the vendor as an expert in technical knowledge and skills In-House expert attorneys on staff.	Building connections between HR systems and leave vendor will allow for more automation and efficiencies	Leave vendors can provide easy access to leave volume dashboards and produce higher-level strategic reports on a consistent basis	Some customization is available	
PROS	EMPLOYEE EXPERIENCE	LEAVE PROCESS EMPLOYER CONTROL	LEAVE ADMIN TECHNICAL SKILLS & COMPLIANCE	STRENGTH OF EXISTING HR TECHNOLOGY	REPORTING	CUSTOMIZATIONS	COST OF SOLUTION
CONS	Little to no control over employee experience. Customizations to improve employee experience are often costly and error-prone	Employer will be reliant on vendor for information needed to complete their internal processes. Employer will not have control over timeline of Vendor-owned process steps	Vendor maintains control of application of technical skills to make all leave determinations	Lack of strong internal systems will mean that outsourcing with a vendor will bring less efficiencies & automation Internal technology often needs customized and/or altered to pass appropriate information to leave system	Employers must often request customizations to strategic reporting for it to provide meaningful segmentation of the population	Customizations are sometimes problematic/lead to errors Customizations incur added cost	Outsourcing is higher cost when compared to leave technology



THE *POWER* TO BE *GREATER*