

# PAID FAMILY AND MEDICAL LEAVE

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Advisory Committee Meeting  
August 16, 2018



# PRESENTATION OVERVIEW

Introductions

Approve July Meeting Minutes

Milestone 1 – Voluntary Plan & adjustments

Service Delivery Roadmap

Outreach & Communications

General Program Update

Open Comment

# INTRODUCTIONS

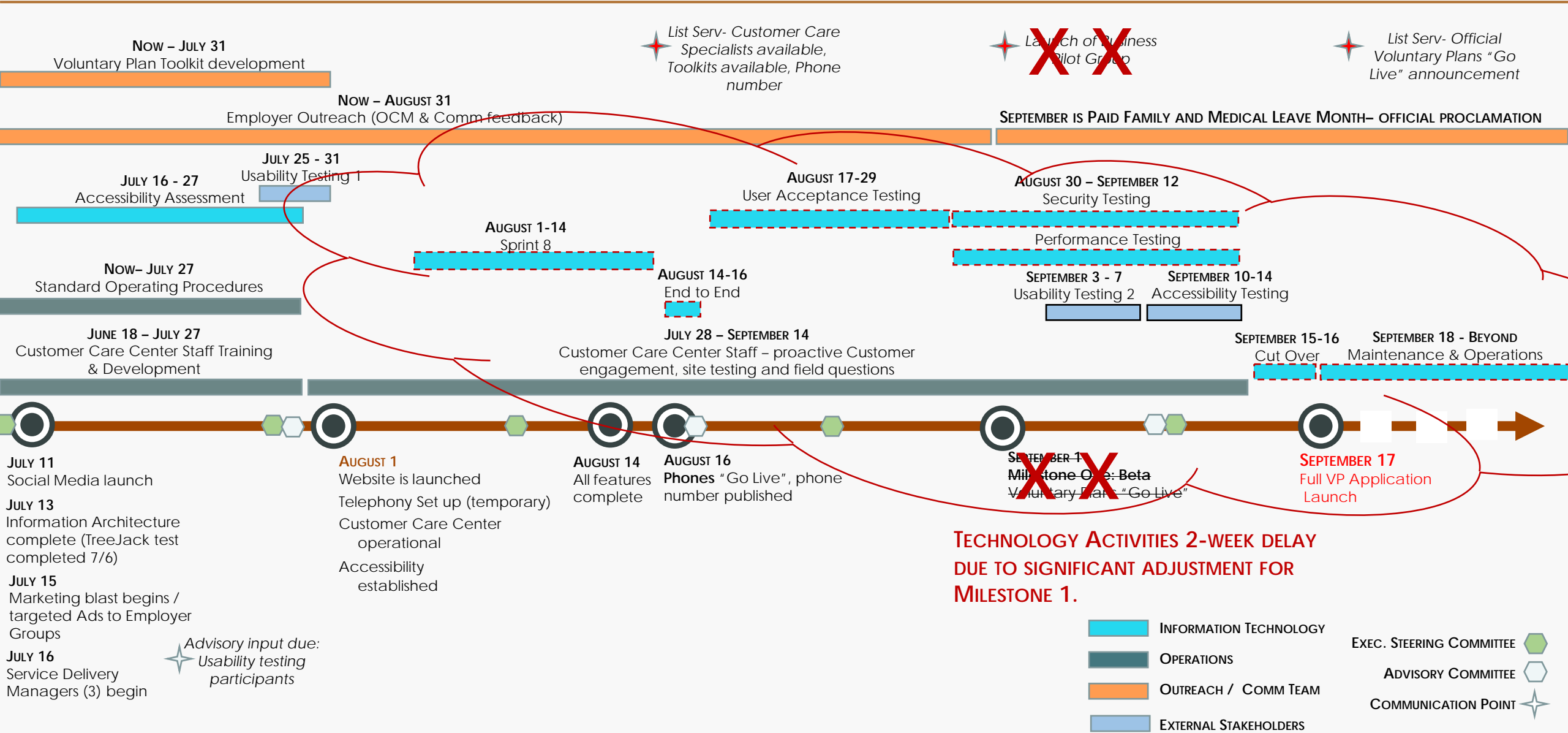
- ▶ Advisory committee
- ▶ In-person attendees

(Note: We will use the conference call feature to identify who is on the phone rather than announce during meeting)

# APPROVE JULY MINUTES

▶ Discussion

# Status Update: Milestone One



# EMPLOYER FEEDBACK (SLIGHT MODIFICATION)

**Task:** Identify 7-10 employers to engage Voluntary Plans feedback

**When:** Between 9/17 – 10/01/2018

**Goal:** Actual VP submission; At the employer's site; Experience as-close-to-real-operations as possible

## Request of Participating Employers:

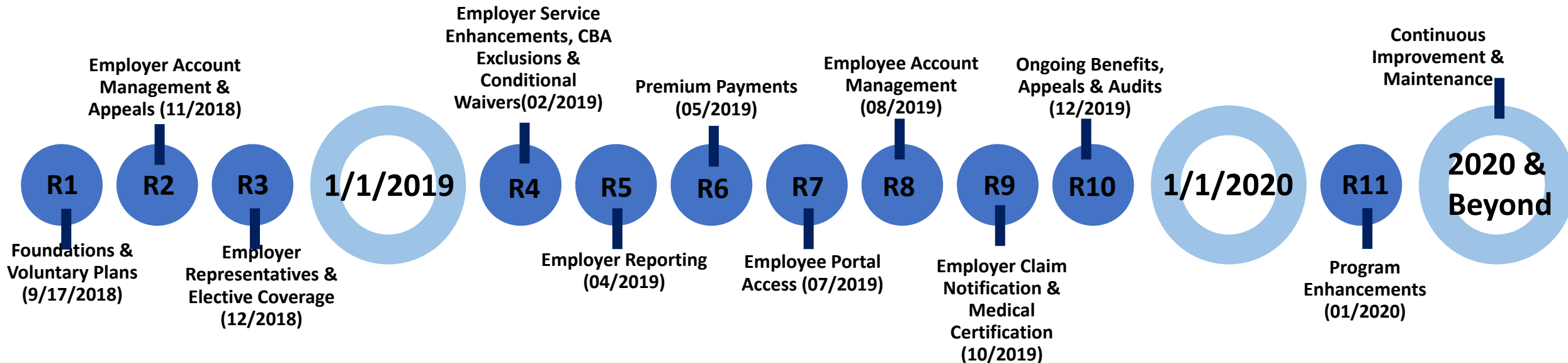
- ▶ Complete their VP submission within a specific window
- ▶ Use the system and the website for the supports
- ▶ Provide extra feedback to ESD

## Criteria:

- ▶ Keen interest in submitting a Voluntary Plan
- ▶ Diverse types of companies (e.g. geographic, government / non government, Business structure (LLC, S Corp), self-insured / privately insured, industry, size)
- ▶ Variety of Voluntary Plans (e.g. Medical only, Family only, Both Medical and Family)

# Paid Family and Medical Leave Service Delivery Road Map

- The Paid Family and Medical Leave Service Delivery Road Map provides information about the plan for release of key services, information and tools that support the program’s implementation. The project team is Agile and embraces changes at every point in the process to rapidly respond to changing or emerging rules; customer feedback; and continuous enhancement to previously delivered services. This ability to adapt to change means the plan will evolve based on the most current and best information we have. The Road Map will be updated to reflect changes as they are identified.
- The Road Map reflects a release about every 7 weeks over the course of the project. Releases will occur on this cadence; however, the scope of each release is subject to change as noted above. We won’t wait until everything is done to deliver something that adds value for the customer. The Road Map each planned release with a more detailed description of the services we plan to be able to deliver by that point in time.
- The Road Map will have a corresponding work break down for each release. This will include all the planned activities we believe will be required to accomplish each of the listed objectives for the release. In Agile teams plans start at a high level and go through a process of becoming more and more detailed as you move closer to delivery.



# Service Delivery Release 1- Foundations & Voluntary Plans

## Complete by 9/17/18

### Customers will have access to...

- Voluntary Plan Guide & Employer Toolkit
- PFML Website—*Available Now!***
- PFML Customer Care Team Phone Center
- PFML presence on social media—*Available Now!***
- Online premium estimate calculator
- Training videos for Voluntary Plan application

### Employers will be able to...

- Login to the external portal using Secure Access Washington (SAW)
- Link their SAW account to their business
- Establish their PFML Contact Information
- Submit a Request for ESD to review their Voluntary Plan and attach supporting documentation
- Pay the administrative fee for their Voluntary Plan application by Check; Money Order; or online by ACH or Credit Card (fee applies to Credit Card payments)
- View the current status of their voluntary plan application

### ESD Staff will be able to...

- Review voluntary plan applications and supporting documents
- Record decisions and actions related to voluntary plan applications
- Make a determination and notify employer of their determination
- View and update employer information
- Manage, report on, assign and look up actions related to employer information and voluntary plans
- Account for funds received for voluntary plan applications
- Account for and report on the cost of voluntary plans
- Record fund balances in the state accounting system
- Receive and reconcile records of payments from USBank
- Produce knowledge base content
- Track internal service requests and incidents



# Service Delivery Release 2- Employer Account Management & Appeals

## Customers will have access to...

- Small Business Toolkit
- Information about PFML through employer focused marketing campaign (Sept. 2018 – February 2019)
- Information about PFML through statewide PFML month tour
- Postcards to WA employers

## Employers will be able to...

- Review and update information ESD (and other sources) has about their business
- Send and receive messages to ESD from the External Portal
- Establish their account is authorized to act on behalf of a business
- File an appeal of a decision related to their Voluntary Plan including supporting documentation
- View the status of an appeal they have filed
- Initiate chat with ESD from PFML Website

## ESD staff will be able to...

- Take action on appeals
- Route appeals to OAH
- Chat with external customers
- Send and receive messages from Customer Administration
- Conduct investigations and audits associated with employer responsibilities

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change.***

# Service Delivery Release 3- Employer Representatives & Elective Coverage

## Customers will have access to...

- State Poster printable from Paidleave.wa.gov
- Information about what they will need to report at the end of Q1 2019

## Employers will be able to...

- Delegate someone in their organization to act on their behalf
- Delegate a third-party to act on their behalf
- Request a conditional waiver of program participation for specific employees

## Third Party Administrators will be able to...

- Register as a TPA
- Provide ESD with documentation that authorizes them to represent employers

## Self Employed people will be able to...

- Elect PFML coverage
- Change/Remove Elective Coverage

## ESD Staff will be able to...

- Load financial reports automatically
- Report information to AFRS automatically
- Load Bank files automatically
- Review and authorize TPAs
- Make Decisions related to Elective Coverage

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change.***

# Service Delivery Release 4- Employer Service Enhancements, CBA Exclusions & Conditional Waivers

## Customers will have access to...

- Employee Toolkit

## Employers and TPAs will be able to...

- Select preferred communication channels
- Turn on/off automated notifications
- Notify ESD of liquidation, quit, or sale of a business
- See all available tools and services on one screen
- Retrieve copies of previous correspondence
- Toggle between businesses
- Take any necessary action related to CBA Exclusions

## ESD staff will be able to...

- Take action on liquidation quit or sale of a business
- Review and approve conditional waivers
- Respond to changes to notification and communication preferences
- Take any necessary action related to CBA Exclusions
- Manage customer contacts through an integrated Service Desk tool
- Report on and analyze common customer concerns

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change.***

## Service Delivery Release 5- Employer Reporting

### Employers will have access to...

- Instructional videos for PFML wage filing

### Employers and TPAs will be able to...

- Submit information about their employees
- Submit employee wages as defined for PFML
- Update employee and wage information from previous reports

### ESD Staff will be able to...

- Return responses to commonly asked questions automatically
- Take any necessary action on employee and wage reports to support employers
- View records related to employer wage filing

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change.***

# Service Delivery Release 6- Premium Payments

## Employers will be able to...

- View Premiums owed based on reported wages
- Employers can make premium payments online
- Employers can make premium payments check/cash/money order
- View their account balance for PFML
- Be notified of delinquent premiums or reports and any ESD action

## ESD Staff will be able to...

- Generate a Premium Invoice
- Send Invoice of premiums and statement/account balance owed to employer
- View and load record of premium payments
- Apply Penalties and Interest to premium invoices
- Report premiums collected to the state accounting system
- Process and issue refunds related to premium payments

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change.***

## Service Delivery Release 7- Employee Portal Access

### Employees will be able to...

- Login to the External Portal
- View information that has been reported about them to ESD
- Submit an application for benefits\*

### ESD staff will be able to...

- Take action on accounts that are out of compliance with reporting or payment requirements
- Determine benefit amounts for future claims\*
- Determine Eligibility for future claims\*

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change. Items with an \* are anticipated to be built but not released for use until 1/1/2020.***

## Service Delivery Release 8- Employee Account Management

### Employees will be able to\*...

- Track their leave usage\*
- View status of their benefit application\*
- Communicate securely with the department
- Authorize someone to act on their behalf
- Set up federal tax options if applicable
- Set up payment options
- Receive benefit payments\*

### ESD staff will be able to...

- Issue a benefit payment\*
- Calculate and apply any necessary deductions or adjustment\*
- Calculate employee account balance\*

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change. Items with an \* are anticipated to be built but not released for use until 1/1/2020.***

# Service Delivery Release 9 – Employer Claim Notifications & Medical Certification

## Employers will be able to...

- Receive notifications associated with their employees' benefit application\*
- Respond to inquiries related to their employees' application\*

## Employees will be able to...

- Complete medical certification associated with their claim\*
- View their account balance

## ESD staff will be able to...

- Review and make determinations based on medical certification\*
- Review and make determinations based on employer response to inquiries\*
- Process and apply penalties and interest to employee accounts\*
- Process and issue refunds for employee accounts\*
- Manage instances of overpayment and related actions\*

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change. Items with an \* are anticipated to be built but not released for use until 1/1/2020.***



## Service Delivery Release 10 –Ongoing Benefits, Appeals & Audits

### Employers will be able to...

- Receive notifications associated with their employees' ongoing certification\*
- Respond to inquiries related to their employees' ongoing certification\*

### Employees will be able to...

- Complete their ongoing certification\*
- Receive ongoing payments\*

### ESD staff will be able to...

- Review and make determinations associated with ongoing benefit certification\*
- Conduct investigations and audits associated with benefits\*
- Process and review appeals associated with benefits\*

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change. Items with an \* are anticipated to be built but not released for use until 1/1/2020.***

## Service Delivery Release 11 –Program Enhancements

Employers will be able to...

- Access additional features and enhancements to be determined

Employees will be able to...

- Access additional features and enhancements to be determined

ESD staff will be able to...

- Access additional features and enhancements to be determined

***DRAFT as of 8/9/2018***

***Note: This represents key services, information and tools that are anticipated for this release. The list is subject to change. Items with an \* are anticipated to be built but not released for use until 1/1/2020.***

## January 2020 to June 2020 and Beyond—Continuous Improvement and Maintenance

- Additional development and release cycles to provide program enhancements and improve functionality
- Begin maintenance and warranty period activity



Employer Readiness Communication Chart																					
Week of:	August 2018				September 2018				October 2018					November 2018				December 2018			
Deliverable	6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24
Outreach presentations	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█				
Gen Listserv Message	█		█		█		█		█		█		█		█		█		█		█
VP Listserv Message		█		█		█		█			█			█		█		█		█	
Small Biz Listserv Message			█		█		█		█		█		█		█		█		█		█
All-employer email			█				█			█		█		█		█		█		█	
Live webinars	█	█	█	█		█		█	█		█		█		█			█		█	
VP Guide/Toolkit	█							█									█				
Employer Toolkit			█						█								█				
Small biz toolkit				█					█								█				
Employee Toolkit				█							█										
UI mailer (all-employers)						█					█							█			
Statewide forums					█	█	█	█	█	█		█		█		█					
Paid advertising					█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█

\*Timeframes expected, specific dates subject to change

**Key**

<div style="display: inline-block; width: 15px; height: 15px; background-color: #006666; margin-bottom: 5px;"></div> Deliverable/Service provided	<div style="display: inline-block; width: 15px; height: 15px; background-color: #cccccc; margin-bottom: 5px;"></div> Update provided	<div style="display: inline-block; width: 15px; height: 15px; background-color: #ffcc99; margin-bottom: 5px;"></div> Tentative
<p><b>Red text:</b> Unsolicited and broad-reaching information</p>		

# KEY MESSAGES/STATEWIDE DELIVERY – THRU JAN. 1, 2019

**Summer 2018**  
Program website goes live  
Paidleave.wa.gov

**MILESTONE 1: Voluntary Plans**  
Sept. 2018  
**Paid Family & Medical Leave Month!**

**MILESTONE 2: Premiums**  
Jan. 1, 2019

**July Key Messages**

- Program is coming + key dates.
- All employers must participate, with few exceptions.
- Voluntary plan applications available soon.

**August Key Messages**

- Download the voluntary plan guide & get your plan ready.
- Customer care center is open for questions.
- Join our live webinars.

**September Key Messages**

- Prepare for premiums + key dates.
- All employers must participate, with few exceptions.
- Voluntary plan applications available + deadline.

**October Key Messages**

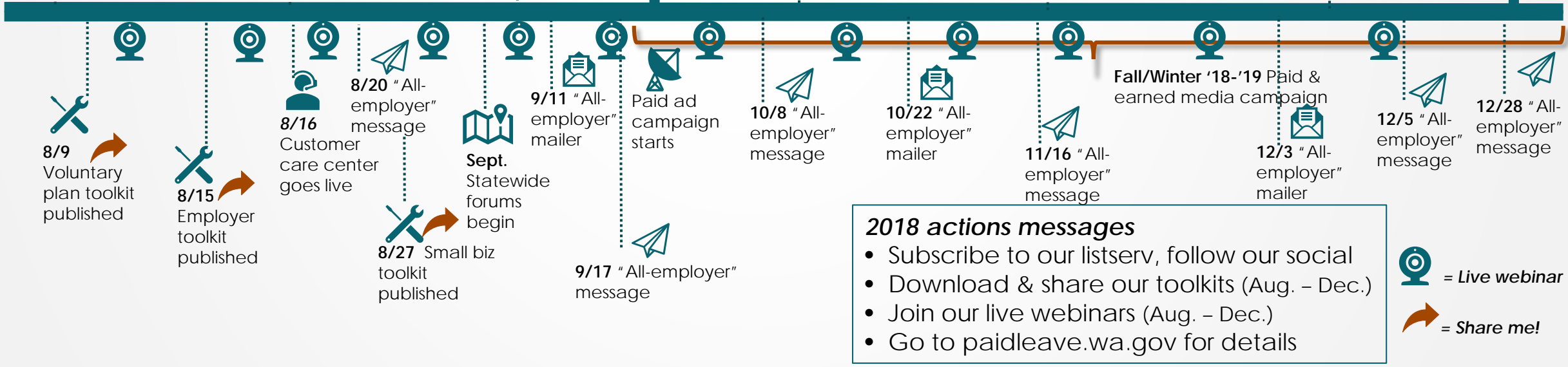
- Prepare for premiums + key dates.
- All employers must participate, with few exceptions.
- Go to paidleave.wa.gov for details.
- Deadline for VP = Nov.

**November Key Messages**

- Prepare for premiums + key dates.
- All employers must participate, with few exceptions.
- Go to paidleave.wa.gov for details.
- Deadline for VP = Nov.

**December Key Messages**

- Are you ready for premiums?!
- All employers with few exceptions must participate.
- Go to paidleave.wa.gov for details.





## Paid Family & Medical Leave

Starting in 2020, Washington will be the fifth state in the nation to offer paid family and medical leave benefits to workers. The program will be funded by premiums paid by both employees and many employers, and is administered by the Employment Security Department (ESD). This insurance program will allow workers to take up to 12 weeks, as needed, when they welcome a new child into their family, are struck by a serious illness or injury, need to take care of an ill or ailing relative and for certain military connected events. If workers experience multiple events in a given year, they may be eligible to receive up to 16 weeks, or up to 18 weeks if the employee experiences a serious health condition with a pregnancy that results in incapacity.

As directed by the Legislature, premium assessment begins on Jan. 1, 2019 and benefits can be taken starting Jan. 1, 2020

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 <b>Employers</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Delectus dicta error. <a href="#">GET STARTED</a>	 <b>Workers</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Delectus dicta error. <a href="#">GET STARTED</a>	 <b>Healthcare Providers</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Delectus dicta error. <a href="#">GET STARTED</a>
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# WEBSITE DEVELOPMENT

- Iterative development, with new features and updates released regularly
- Responsive design
- 504 compliant



# GENERAL PROGRAM UPDATE

## Proposed 2019 Advisory Committee Meetings

- ▶ January 17<sup>th</sup>
- ▶ February 21<sup>st</sup>
- ▶ March 21<sup>st</sup>
- ▶ April 18<sup>th</sup>
- ▶ May 16<sup>th</sup>
- ▶ June 20<sup>th</sup>
- ▶ July 18<sup>th</sup>
- ▶ August 15<sup>th</sup>
- ▶ September 19<sup>th</sup>
- ▶ October 17<sup>th</sup>
- ▶ November 21<sup>st</sup>
- ▶ December 19<sup>th</sup>



# FOR THE GOOD OF THE ORDER

▶ Open Comment

# CONTINUE THE CONVERSATION

**Carla Reyes**

Interim Director, Paid Family &  
Medical Leave

Washington State Employment  
Security Department

(360) 485-2349

[CReyes@ESD.WA.GOV](mailto:CReyes@ESD.WA.GOV)



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