



**PAID FAMILY & MEDICAL LEAVE**  
**JULY 26, 2018 | 10:00 AM – NOON**  
**ADVISORY COMMITTEE MEETING MINUTES**  
**ESD 640 PARK PLACE CONFERENCE ROOM**

<b>Attendees</b>	Department Representative: Carla Reyes, Paid Family and Medical Leave Interim Director Paid Family and Medical Leave Act Ombuds: Edsonya Charles Employer’s Interests Representative: Bob Battles Employer’s Interests Representative: Julia Gorton Employer’s Interests Representative: Tammie Hetrick Employer’s Interests Representative: Christine Brewer Employer’s Interests Representative: Samantha Grad Employee’s Interests Representative: Joe Kendo Employee’s Interests Representative: Marilyn Watkins Employee’s Interests Representative: Maggie Humphreys (on Phone)
<b>Guests</b>	PFML Policy & Rules Manager: Matt Buelow PFML Technology Manager: Lisa Kissler PFML Business Design Specialists: Danny Salazar and Debra Crumley
<b>Members Absent</b>	All present.
<b>Scribe</b>	Melanie Bowdish

**Welcome and Introductions: Carla Reyes**

- Introductions in room. (Note: conference call technology records the participants dialing in.)
- June meeting minutes approved.

**Policy and Rules Update: Matt Buelow**

- In the last meeting the Advisory Committee approved breaking Phase 3 into smaller additional phases of rules making. Matt presented proposed timeline for additional phases.
  - Phase 2 – Employer Responsibilities, grants and penalties: already underway and anticipating rules take effect in December 2018.
  - Phase 3 - Benefit applications and eligibility: to file CR101 on August 1, 2018 and rules taking effect end of April 2019.
  - Phase 4- Continuation of benefits & fraud: to file CR101 in October 2018 and rules take effect in July 2019.
  - Phase 5- Job Protection, benefit overpayments & miscellaneous: file CR101 in January 2019 and rules take effect in September 2019.
  - Phase 6- Appeals: file CR101 in April 2019 with rules take effect December 2019.
- Advisory Committee approved the new phasing and schedule.



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**ACTION Matt:** Always include the Phase # in the communications and provide key deadlines in the email subject line to help keep timely attention.

- Advisory Committee requested the public and coordination meetings during legislative session are held on the Capitol Campus, so that it does not affect attendance. Agreed to blocking their calendars on Fridays from 1:30-3:00.

**ACTION Matt:** Send meeting notice to Advisory Committee and locate meeting room(s) on Capitol campus for during Legislative Session.

## Milestone 1- Roll Out Plan: Carla Reyes & Lisa Kissler

- Reviewed the key dates on the project schedule (slide 6).
- Noted the Customer Care Team is engaging early to support the Employers and others who have questions about Paid Family and Medical Leave. The staffing levels for the Care Team will increase over the next couple months to support the technology releases and anticipated demand.
- When asked about the expected volume, Carla outlined the staffing levels are currently set for the expected supports anticipated for Voluntary Plans.
- The Customer Care Team will be site testing and field questions via email (beginning 8/1) and the phones (beginning 8/15).
- The technology includes a Customer Relations Management (CRM) System which track calls, has smart technology to monitor questions and answers, and has the ability to provide data reports. The CRM Technology to be activated 9/1.
- PFML has secured contract Interpreter services to augment the Customer Care Team.
- Communications has actively been sending information to the Society of Human Resource Managers (SHRM), Associations, and the Chambers of Commerce.

**ACTION Clare:** Send a list to the Advisory Committee of the employers who have been contacted.

Advisory Committee offered the following considerations:

- It would be interesting to know who is calling by sector, types of questions and some reporting from the CRM system.
- Would like active communications to inform employers of the premium responsibility and would like to see the communication plans beyond Milestone 1.
- How is the hand-off occur with Labor & Industries?



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## Soft Launch for Voluntary Plan (VP)

ESD would like to work with a small group of employers to solicit their feedback on the Voluntary Plan application process, to include their input on all aspects of the applications process (e.g. technology tools, website information, toolkits and planning guides, customer care center (phone) experience). ESD needs the assistance of the Advisory Committee to identify employers to participate in this feedback effort.

**When:** Between 9/1 – 9/14/2018

**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)

**ACTION-- Advisory Committee:** Identify 7-10 employers to participate in the Voluntary Plans "soft launch"

## Product Demo: Danny Salazar and Debra Crumley

ESD provided a product demo of the Secure Access Washington authentication and the Portal. The team was not able to go through the entire technology build (CRM, Accounting/Treasury- back end functions not visible to the public). Key points in the information presented:

- Milestone 1 includes both the option to submit Voluntary Plans as well as the whole technology solution (foundation to support all future releases).

All members of the Advisory Committee were concerned about the high level of automation offered for the Voluntary Plan application process. Many immediate reactions and questions from the Product Demo, focused primarily on the Portal component, were offered by the Advisory Committee.

Specifically, the Advisory Committee offered the following considerations:

- Addition of an online calculator for Employers and Employees.
- Whenever we seek employers and employees to be scheduled for usability testing, please provide as much possible notice (e.g. September 3-7 Usability Testing 2 on the Roll out Plan).
- There needs to be a work around for businesses that do not have an EIN.



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- Would like to see the actual plan be included as part of the Voluntary Plan application, at least the specific relevant parts.
- Concerned about the auditing expectations of ESD-PFML program.
- The question format and story problem for the Voluntary Plan application is confusing.
- Would like to see more upfront context at the beginning of the application and provide some tips, WAC, RCW and reference to supporting information (website).
- Provide help text to the application.
- Provide definitions for key terms that may not be commonly understood (e.g. serious health condition).

### **General Program Update: Carla Reyes**

- Next Meeting / Agenda:
  - Feature Map and related activities in support of Milestones 2 and 3, begin the conversation about the supporting processes (e.g. communications) in support of the technology
  - We will meet in the same space (AWB), on August 16, 10:00am – 12:00pm

We are looking to host a couple of the Advisory Committee meetings in Seattle.

**Action Carla-** update meeting notices with the correct meeting location.