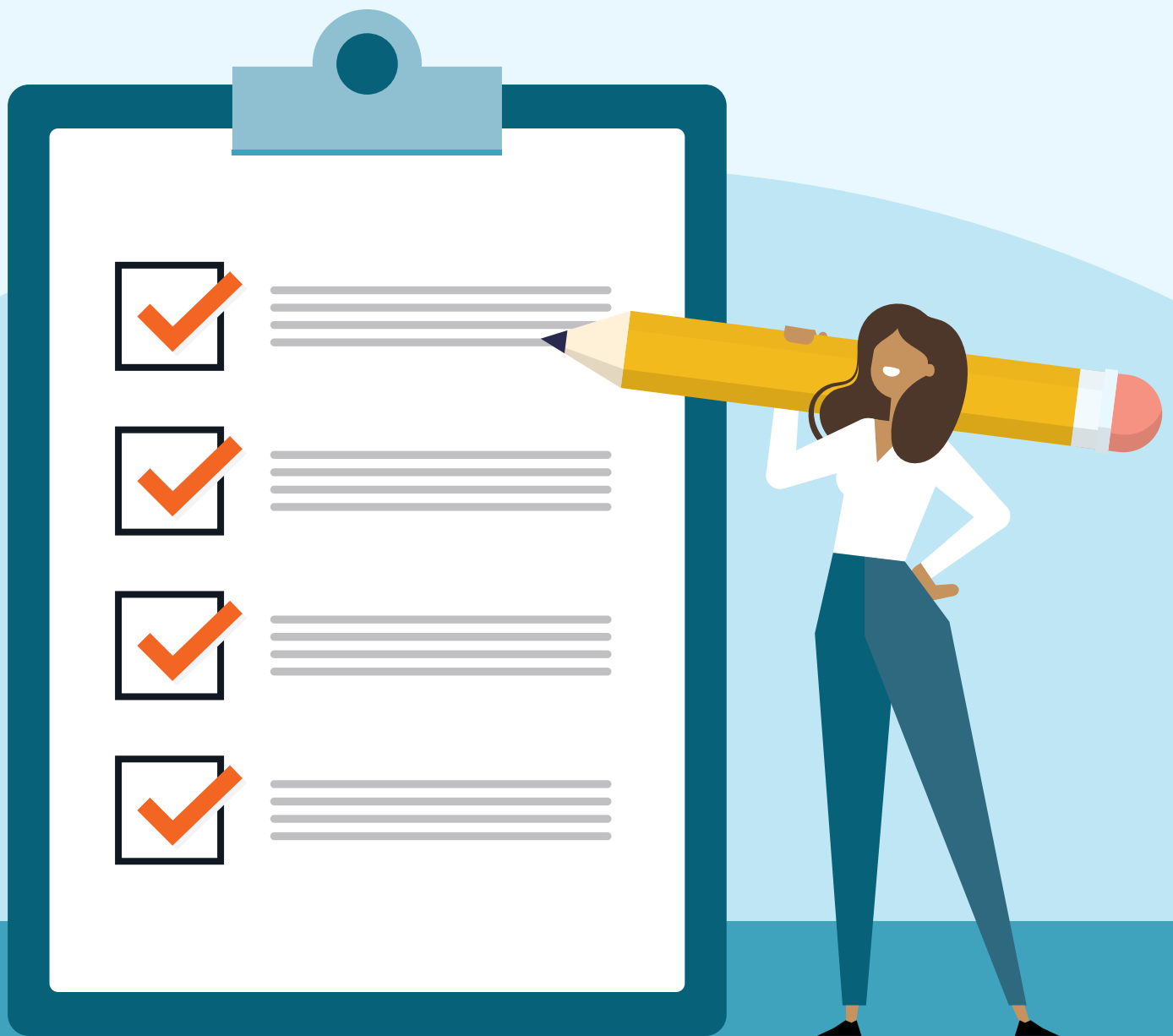


An HR Leader's Guide for **Building an Insourced Leave and Accommodations Program**



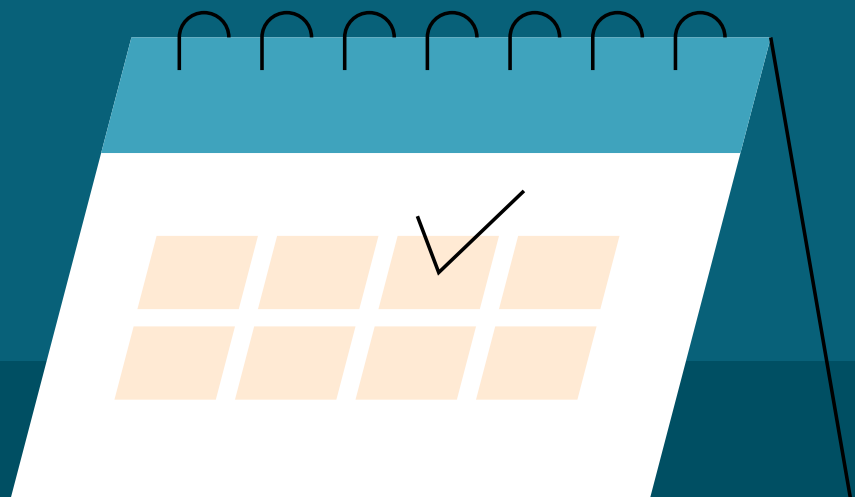
Managing leaves of absences and workplace accommodations is not getting any easier, especially for large employers. Federal and state laws are always changing, and more companies are adding new leave benefits every day. With modern workforces being more distributed than ever before, just making sure your leave program is compliant can feel like a full-time job.

A competitive labor market is also adding to HR's challenges. Employee experience and retention are quickly becoming key drivers of business success. This puts HR under pressure to make sure every interaction, including taking a leave and the ADA interactive process, is positive, supportive, and infused with a company's values.

Some organizations have looked to outsourcing to address the growing complexity and frustration of leave management (and in some cases, accommodations, too).

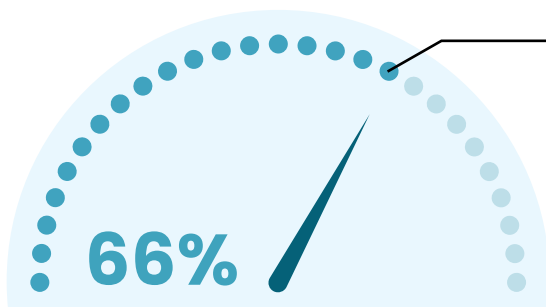
While outsourcing can sometimes save personnel time, it also means sending employees to someone outside your organization during a stressful time, instead of their own co-workers.

Outsourcing can also complicate some processes with excessive back-and-forth, as well as add significant costs, especially as your employee base grows.



The good news is with advances in leave and accommodations management technology, there is a better way. Insourcing your leave program no longer means manual processes, post-its, email reminders, and spreadsheets. With the right technology, you can:

- ✓ **streamline processes,**
- ✓ **centralize case information and data,**
- ✓ **track leave usage,**
- ✓ **track accommodations made and their costs,**
- ✓ **personalize communications,**
- ✓ **and automate notifications and follow-ups.**



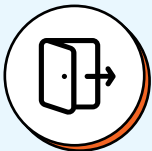
These powerful features give your in-house team a way to manage a leave 66% faster, while giving them more time to spend supporting their co-workers during stressful and challenging times.

In this guide, we walk you through everything you need to know to take your leave program in-house – or just leverage the right technology and best practices to level-up your existing leave and accommodation program. We've created a series of handy checklists that you can use to build a great leave and accommodations program for everyone.

Make sure you have the right technology provider

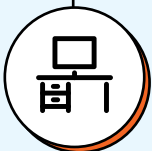
Without the right technology, insourcing your leave and accommodations program is tedious, error-prone, and time-consuming. The solution you choose is single the most important decision to get right – it will become the foundation of your new team structure and processes. You want to make sure you choose a provider that offers a fully featured, all-in-one leave and accommodations management solution, along with an experienced, CLMS-certified implementation and support team.

To set your insourced program up for success, make sure the solution you choose offers **all** the following:



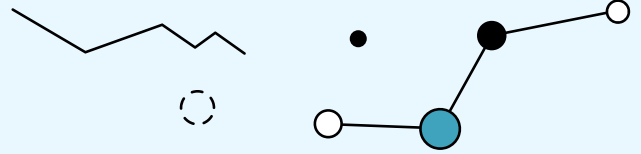
Leaves of Absence

The leave management software you select should enable your HR team to enter in all the details of a request, and have eligibility for federal, state, and company-specific policies calculated instantly. The system should be able to track and decrement time from a time bank for each leave. The software should allow you to create packets and communications in seconds with pre-generated, customizable templates. Finally, the platform should be able to send automated reminders throughout the leave process to ensure a seamless return to work.



Workplace Accommodations

Leave and accommodations often overlap, which is why you need a single system to manage both. HR teams should be able to quickly open a case and track the entire ADA interactive process end-to-end. It should also provide a secure, centralized location to track and access important case details, including costs and medical documentation. The platform should also automate follow-ups to effectively monitor accommodations.



Employee Self-Service (ESS)

To ensure your software can deliver the best possible employee experience, you want to be sure it offers a self-service portal. These portals should be mobile-friendly, and guide employees quickly and easily through the request process. The software should show their eligibility instantly and allow them to log back in at any time to check the status of their request.



Faxing & Barcoding

To make sure your platform can quickly receive and store faxes from medical providers, it should offer a fax barcoding service. Each case should have a unique barcode, so faxes can be instantly scanned in and attached to the correct case.



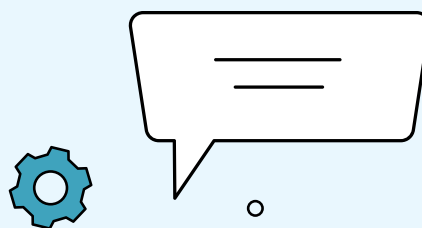
Batch Fulfillment

Depending on the type of leave requested, federal regulations might require you to mail notifications to employees. Your leave solution should have batch fulfillment functionality, so you can send all your communications to a print center or print vendor in one batch, right from the system.



Text Messaging

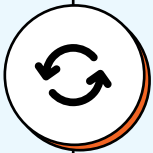
To make sure you can communicate with every employee in the method that is most convenient for them, you'll want to make sure your platform supports text messaging. It's also very important to make sure it centrally stores the message and attaches it to the right case, so you can refer to it easily for compliance purposes.





Insights and Reporting

A real-time, customizable reporting function provides important insights you need to build and grow a robust leave and accommodations program. The platform should allow you to quickly export reports for sharing, schedule reports for regular distribution, and create dashboards for at-a-glance insights.



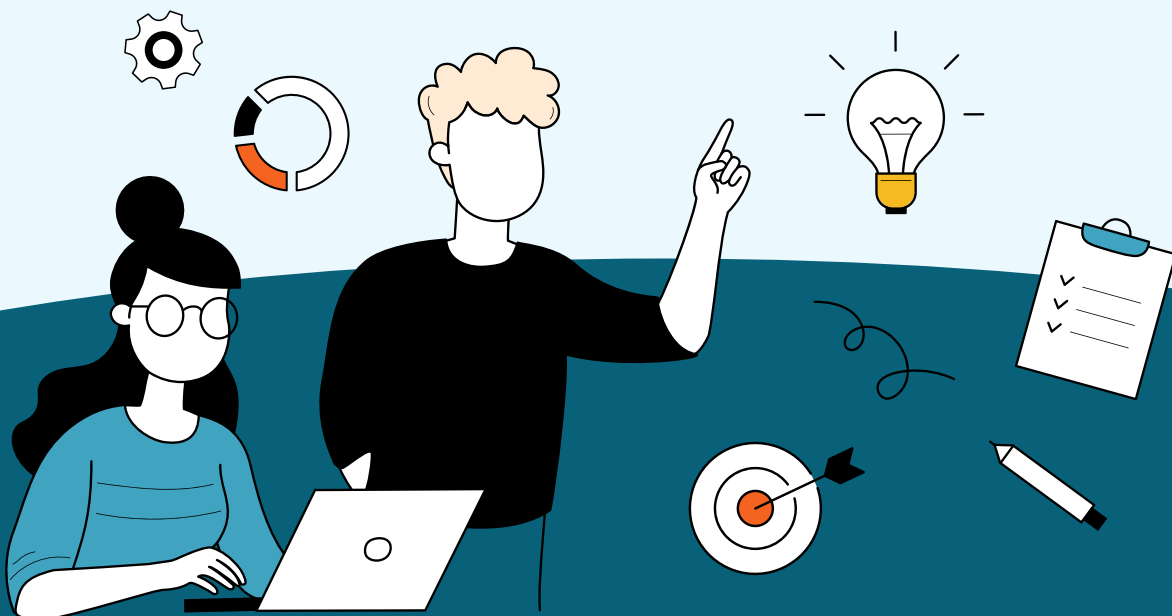
Automated Compliance

State leave laws change all the time, and new federal regulations come out regularly. To stay compliant and avoid risking a lawsuit, you should make sure the solution you choose is automatically updated as soon as new laws take effect.



Trained Support and Expertise

You want to make sure the solution you invest in isn't going to deprecate their services or change focus, so make sure you research how long they've been in business and who they serve. A provider who offers CLMS-certified support will have the expertise to help you build a modern, efficient, and robust leave and accommodations program.



STEP 2

Organize your team

Getting your team organized and ready is the next step when building your in-house leave program. If you need more headcount, or need to adjust an existing employee's responsibilities, you will need plenty of lead time to prepare.

To get your team ready for insourcing your leave program, you should consider the following questions:

? How many team members do you need?

? Are there any skill gaps on your existing team?

? What will your reporting structure be?

How you distribute incoming requests to your leave team is a key part of your overall team strategy. Some examples of how you allocate leave requests could include:



Location

You could dedicate a leave manager to specialize in requests from employees in states with complex leave and accommodations laws, like California or Oregon.



Case Complexity

More senior or experienced leave managers could be assigned cases that are more complex or involve overlapping policies like short-term disability, FMLA, and parental leave.



Workload

A "round robin" approach can be used to assign requests to leave managers as they come in to ensure an evenly distributed caseload.

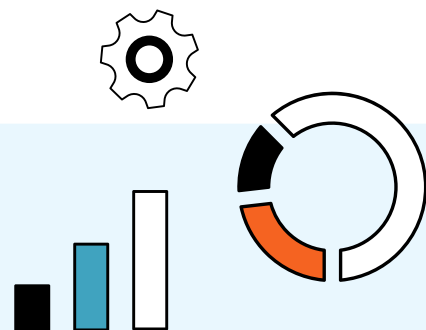
Set up measurements and metrics to ensure team performance and satisfaction

Once your team structure is in place, you should next think about ways to make sure your team is performing well and satisfied in their role. First, you will want to define your team's:

- Key Performance Indicators (KPIs)**
- Ideal workload (how many cases each person can handle)**
- Other team satisfaction measurements, such as surveys**

Leave management software provides important data that can help keep an eye on how your team is doing with their new responsibilities. You should regularly review the following data from the platform to make informed decisions about your team.

- Number of cases overall**
- Number of cases per team member**
- Case type (leave or accommodation)**
- Length of each case**



With this data, you could easily see if one of your team members had a lot more cases than their colleagues and needed additional support. If the pattern continued, you could make changes to ensure cases were distributed more equally. To alleviate workload issues, you can log in to a leave management system to instantly reassign a case from one team member to another, without the new leave manager having to “get up to speed.”

Leave and accommodations management software also offers additional insights that can help you make better, data-driven decisions. Below are a few of the insights that can help you improve your leave and accommodations program.

- 💡 **Which employees have submitted leave requests**
- 💡 **Leave eligibility and approval status**
- 💡 **When employees will return to work**
- 💡 **Workplace accommodations status**
- 💡 **Cost associated with each accommodation**
- 💡 **Length of accommodation**
- 💡 **Intermittent leave usage (who is out and for how long)**
- 💡 **Which employees need recertification for intermittent leave**



STEP 4

Build new processes for leave and accommodations requests

When you bring your leave and accommodations program in house for the first time, you need to think through your processes. You should carefully look at what will happen, from start to finish, for each type of incoming request. Answering the following questions can help you create your new processes.

Were there gaps, challenges, or other issues with the outsourced leave process that should be addressed and changed in the new process?

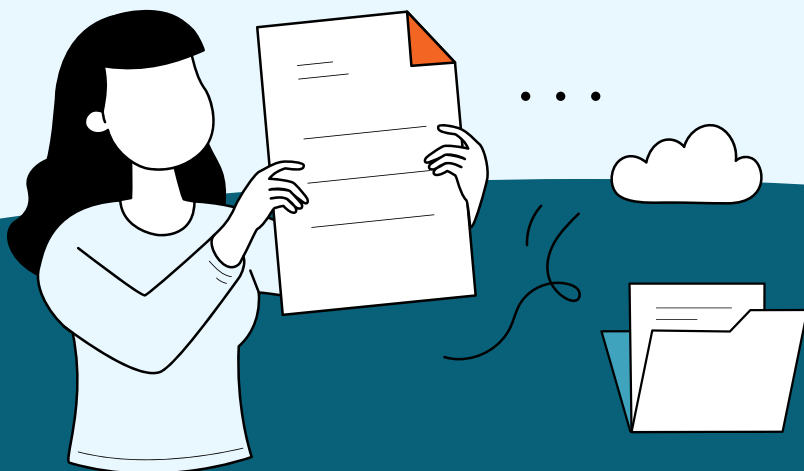
How will employees be instructed to make a leave or accommodation request? Phone, email, text, or via a self-service portal?

How will your team intake these leave and accommodations requests?

How and when will you communicate with your employees throughout the leave and accommodations process? Email, phone, or via customized notifications sent from a centralized system?

Will there be types of leaves or accommodations that need to be escalated? If so, which ones?

Are there steps in each process that need peer review to avoid lawsuits and ensure the right decision has been made?



STEP 5

Identify and prepare your data and HR tech stack

At the end of the day, your new leave and accommodations program (and foundational technology) can only be as effective as the data you put into them. The key to making sure your program is compliant and efficient is thorough, accurate employee data. You should partner with your IT team to walk through the following questions.

What employee data does our organization currently have, and how far back does it go?

Where are the sources of the employee data currently located?

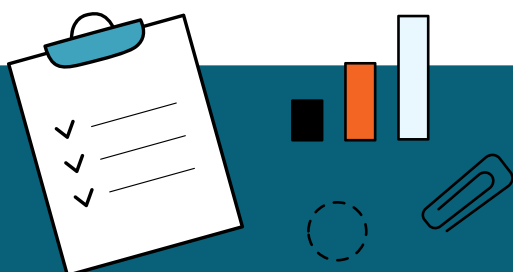
What tools are in our HR tech stack?

How should our adjacent HR tools integrate with a leave and accommodations management solution? What data will be coming in and from where? What data needs to go out and to where?

What new data will we leverage for insights and reporting?

Are there internal stakeholders who will want to see regular reports and metrics?

Who will be on my technology implementation team? (IT and HR should both participate to ensure a smooth, fully integrated software implementation)



Conclusion

In today's workplace, employee experience and worker retention are essential. Providing a streamlined, supportive, and personalized leave and accommodations program can help you meet recruitment and retention goals. Employees will return from leave happy and productive, leave teams will have easier ways to collaborate and improve productivity, and compliance will be far simpler.

Building an insourced leave program that isn't filled with spreadsheets, sticky notes, and frustration is much easier with today's technology. With leave and accommodations software like AbsenceSoft, your in-house team can let automation handle the busy work so they can focus on what's most important: supporting their co-workers.

To learn more about insourcing your leave program, and to see AbsenceSoft in action, schedule a demo today.

absencesoft.com

