



Best Practices for Modern FMLA Management

A Guide to Improving Your HR Processes with Technology



Introduction

Managing FMLA can be a complex, time-consuming process for HR professionals. It's a big undertaking to make sure eligibility is calculated correctly for every case, the right forms and communications are sent on time, and that the leave taken is accurately tracked. It can be especially challenging if FMLA management is just a small part of your overall role.

In this guide, we'll review the FMLA management process and share best practices we've collected from helping **over 200 customers** streamline and optimize their leave management. Most importantly, we'll show you how to leverage technology to improve the process for both yourself and the employees you are caring for.



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Requesting FMLA

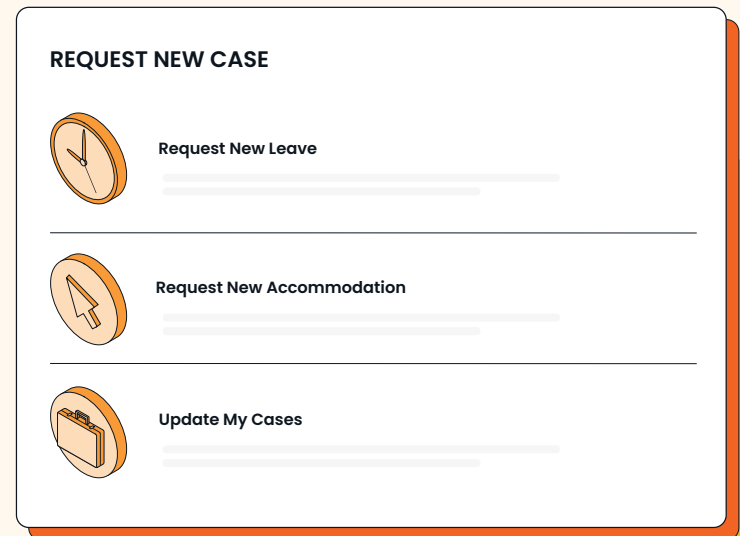
The FMLA process starts as soon as an employee makes a leave request. Without leave technology, an employee would call or email a leave manager with their request. Then, the leave manager has to make sure they have captured all the pertinent details from the employee, including the length of time being requested, the type of leave, contact information, and more.

Handling leave requests this way requires a lot of back and forth to capture all the necessary information. Because employees don't request FMLA many times in their career, they almost never know what to ask for, or what to provide. This places a big burden on leave managers, who must first let employees know what information is needed, and then answer numerous questions about what types of leave are available, and what leaves the employee could be eligible for. Then, they must keep all these details organized, usually in a spreadsheet or other application not specifically designed for leave management.

There is an easier, better way for employees to request leave. Leave management software like AbsenceSoft provides two great ways to streamline this process.

Many employees still call HR teams to request leave. While you are on the phone, you can login to AbsenceSoft—instead of starting a spreadsheet or taking notes. You can open a case in just minutes by asking a few quick questions, and filling in the appropriate fields.

AbsenceSoft also offers a web-based, mobile-friendly, self service portal. To request FMLA, employees simply go to the portal and are guided through a series of four easy steps. The portal can even automatically calculate and show the employee their potential entitlements and eligibility. Throughout their leave, employees can log back into the portal at any time to see how much time they have taken, and how much time is left.



Eligibility & Entitlements

There are numerous calculations that go into determining if an employee is eligible for FMLA, including total hours worked and length of service. With the average award for an FMLA lawsuit being \$400,000, it is critically important to make sure you calculate leave eligibility correctly every time.

But if you don't have access to a system that provides historical data on the length of service, accessing these details—and making sure they are correct—can be a scramble. Without a centralized system of record, bridging service dates for employees that depart the company and come back can also be a challenge.

This is where technology can really save time and improve accuracy. Leave software like AbsenceSoft serves as a central location where you can store and access each employee's complete, historical length of service, and hours worked. It can also track previous time taken, which could impact eligibility. In just a few seconds, the system can automatically calculate FMLA eligibility for each case.

Once eligibility is determined, AbsenceSoft can **automatically calculate exactly what entitlements an employee is eligible for.**

It can centralize federal and state leave laws, as well as company-specific policies, and apply them to each case automatically. In one centralized system, leave managers can quickly determine not only FMLA eligibility, but other leaves each employee could be eligible for as well.

POLICY	REQUESTED START	REQUESTED END	PROJECTED END	ELIGIBLE
Family Medical Leave Act	09/15/2022	11/14/2022	11/14/2022	Yes
All of the following statements must be true				
The employee has worked at least 1,250 hours in the last 12 months				Override
The employee works in an office with at least 50 employees that all work within a 75 mile radius				Override
The employee has worked at least 12 months				Override

Initial Packet

Within five days of receiving an FMLA request, you must send the employee an eligibility packet, along with a rights and responsibilities notice. Depending on what type of leave is being requested, your state may also require you to send additional forms and notices within a certain time frame.

In this part of the process, setting clear expectations with the employee is key. No matter why someone is requesting FMLA—health conditions, caregiving, or even maternity leave—they are all dealing with the stress a life change brings. As a leave manager, you want to be as informative and clear as possible to support your employees during life-altering changes.

Federal and state regulations have rules about when forms and other information that should be sent, and complying with all of them is not always easy. You need to be sure each employee requesting leave receives the right information, and that you document what was sent and when. As state laws change, you need to make sure you are sending the most up-to-date forms to stay compliant.

Rather than sorting through folders, downloading forms, and writing an email from scratch, **leave management software can automatically generate a customizable packet for you.** Even better, the system is updated automatically when federal and state law changes, so you know you are sending the most up-to-date forms and other required communications. Instead of relying on spreadsheets, the software also can serve as a system of record, tracking when and what information was sent.

The screenshot shows an email composition interface. At the top, there are fields for 'CASE:' and 'REQUESTED LEAVE:'. Below these are fields for 'SEND BY:' with radio button options for 'Email' (selected), 'Text', 'Print/Mail', and 'Fax'. To the right of 'SEND BY:' are fields for 'TO:', 'CC:', and 'SUBJECT:'. A large grey box contains placeholder text: '{Company Name}', '{Company Address}', '{Employee Name}', and '{Employee Address}'. Below this is a yellow bar with a paperclip icon and the text 'ATTACHMENTS'. Underneath, there is a list of three attachments, each with a blue checkmark icon: 'Authorization to Release Medical Information', 'Certification for FMLA Employee Health Condition', and 'Employee Rights and Responsibilities under FMLA'.

AbsenceSoft updates automatically when state laws change, so you will always have access to the latest forms and regulations.

Medical Certifications

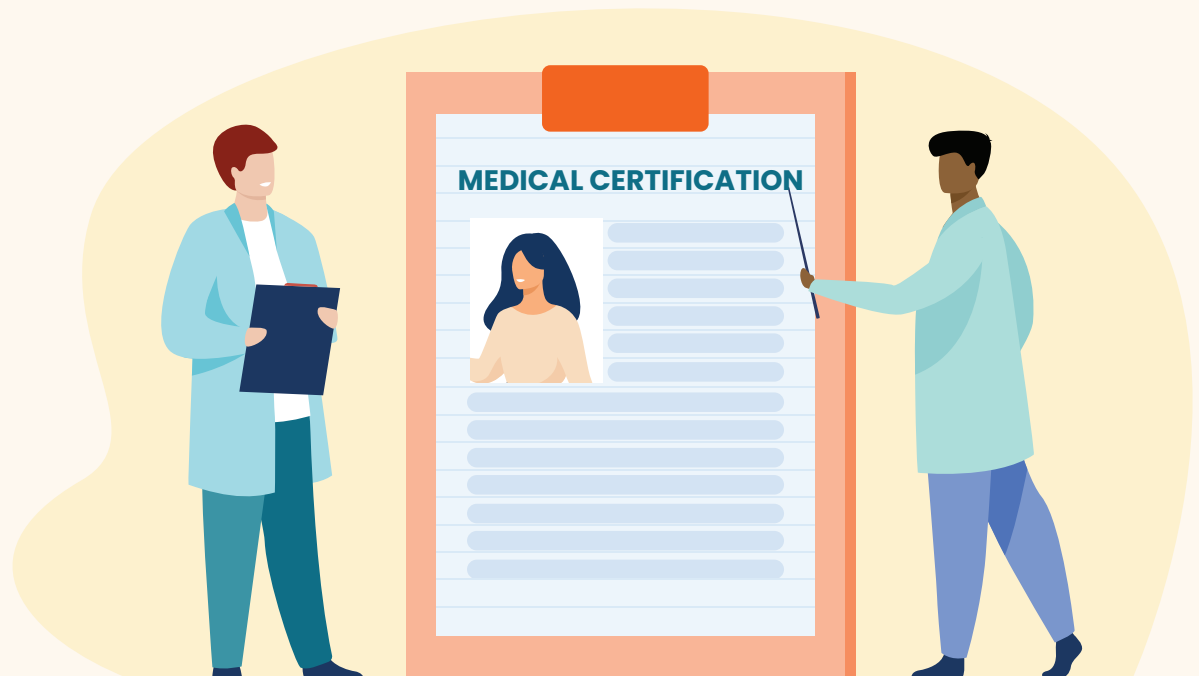
Once the packet is sent out, you must receive it back from the employee within 15 days. However, employees often struggle to get certifications back within the allowed time, which can impact the entire process.

Leave managers can help by sending a reminder (or two) before the due date. However, when you are managing multiple cases, knowing when to do this for each employee can mean relying on post-its, email reminders, and spreadsheets.

A better, more reliable option is to let leave management software track due dates and send reminders for you. In one location, you see every upcoming due date for each case. You can also create and customize automated reminders to send to employees before each due date. This can really help employees understand exactly what they need to return to you and when they should return it by.

When you get a certification back, you should thoroughly review everything to make sure it is complete and accurate. This can include following up to make sure doctors and other providers are valid, and that they have fully completed all of the necessary forms.

AbsenceSoft provides a central, easy-to-access location for tracking, storing, and reviewing medical certifications. Leave managers can even add notes to document conversations to create more complete record.



Approval or Denial

Leave managers must always make sure they properly and consistently approve or deny leave. If a leave is incorrectly denied, it can lead to a lawsuit or failed audit. It helps to seek out second opinions on more complex or challenging cases to ensure you make the right call.

When a leave is approved, you want to be sure to communicate clear expectations about what employees should and should not do when out on leave, as well as what to expect from your end in terms of follow-up and tracking. Employees don't request FMLA very many times in their lives, so your communications should be as detailed, precise, and informative as possible to avoid confusion.

Leave management software like AbsenceSoft gives leave managers an easier and faster way to set expectations and communicate an approval or denial. **You can create a set of standard, consistent, and thorough communications that can be easily customized for each request.** Leave managers can also receive automated reminders and alerts to make sure they send approvals or denials within five days to comply with federal law.



Case Management

FMLA case management involves a lot of tracking. You need to know when leave starts, when certifications expire, and when leaves are exhausted. Leave managers can end up with folders covered in post-it notes, calendars filled with one-off reminders, and multiple spreadsheets.

Having to comply with a complicated web of state, local, and company-specific policies—that can make employees eligible for different leaves—can make tracking even more of a challenge. With multiple competing priorities and so many dates to track, it is not hard for leave managers to inadvertently miss some.

Leave management technology gives you the tools you need to never miss a key date or lose track of an employee on leave. **In one view, leave managers can easily see how long an employee has been gone, when certifications are ending, and their return date.** You can even create an automated, streamlined process for employees who need to have a leave recertified.

The screenshot displays a user interface for case management, organized into several sections on the left and a column of action buttons on the right.

- Case Info:** Includes fields for Case ID, Type, Status, Description, Summary, Requested Start, Requested End, and Case Manager.
- Employee Info:** Includes fields for Case ID, Hire Date, Hours Worked, Employer, and Office Location.
- Case History:** A horizontal bar representing a timeline or history.
- Policies:** Features a "Change Status" button and two "FMLA:" input fields.
- Time Tracker:** A table showing leave tracking data:

Policy:	Time Used:	Time Available:
FMLA	4.3 weeks	7.7 weeks
Company Policy	2 weeks	8 weeks
- Work Restrictions:** Includes an "FMLA:" input field and an "Add Restriction" button.
- To-Do's:** A table with columns for To-Do, Due, Status, and Assigned to. One entry is "Send eligibility packet".

On the right side, there is a vertical stack of blue buttons: Communications, Notes, Case Activity, Contacts, Healthcare Provider, New Case, Change Case, Add Accommodations, Add Restriction, and Add To-Do.

Intermittent Leave

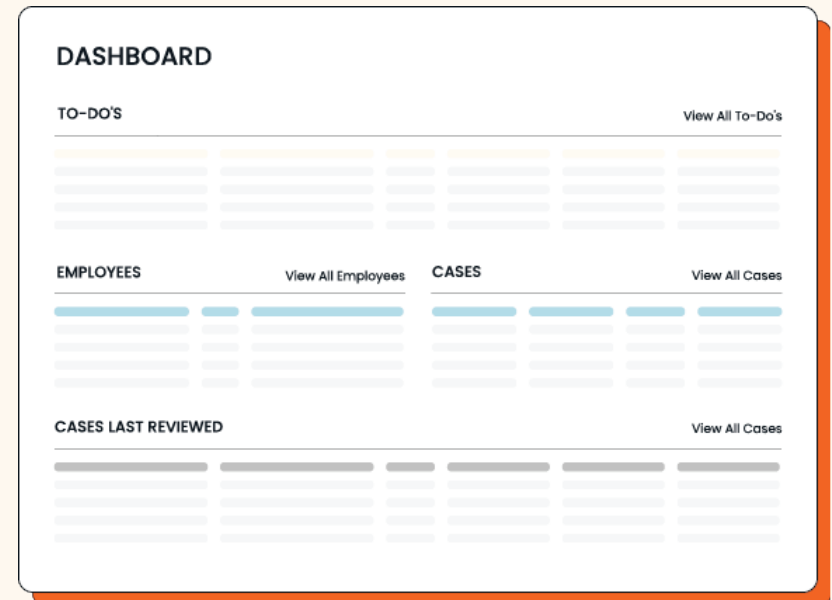
Employees struggling with migraines, asthma, or other conditions can request leave that is taken in smaller, unplanned increments. This is known as intermittent leave—instead of consecutive leave, which is taken all at once.

Accurately managing and tracking intermittent leave is a complex undertaking, and requires a great deal of effort from leave managers.

Every time an employee uses some of their intermittent leave—which can be monthly, weekly, or even multiple times a week—it adds more work for leave managers. The date and amount of time taken needs to be recorded. Supervisors and coworkers should be notified. The time taken must be tracked against an overall entitlement amount. Once leave is exhausted, it may need to be recertified. Without the power of automation and technology, it is easy to see how complex managing just one case can be.

Technology makes managing intermittent leave much easier and faster. **In one centralized system, leave managers can decrement time taken consistently against an approved time bank and certification details.** Employee self-service portals let employees enter in the time taken directly in the system, without the need for a phone call or email. If a certification is about to expire, leave management software can send automated reminders—and even automatically recertify a leave.

Because it is unplanned and taken more often, intermittent leave can be very disruptive for managers, coworkers, and business continuity. Without leave technology, administrative tasks can become so burdensome that leave managers don't have much time for anything else. Through automation and centralized visibility, leave management software saves hours of time, and puts every important case detail right at your fingertips. You get everything you need to help employees take their leave in ways that minimize negative impacts to the business.



Return to Work

At the end of any certification, leave managers should have a process for supporting employees in their return to work. While some employees inevitably choose not to return to work, others might be in need of an extension or recertification of their leave.

Verifying that an employee is coming back to work is a very commonly missed step in the FMLA leave management process. Once an employee goes out on leave, it is easy to get caught up in other pressing day-to-day tasks and forget to follow up when their leave ends, especially if you don't have centralized leave management software to support you.

However, bringing people back to work is beneficial to both the business and the employee. Some studies have shown that recovery can accelerate once employees get "back in the swing of things."

Leave management software like AbsenceSoft enables HR professionals to automate and streamline all the steps involved in a successful return to work.

From notifying managers to updating critical systems, leave managers get the tools they need to save time, reduce errors, and improve retention.

As a leave manager, you should think through how to make every employee's return to work as seamless as possible.

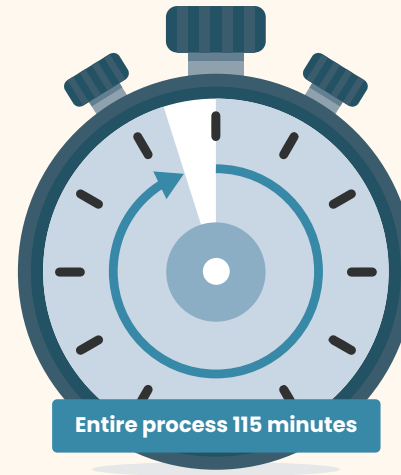


Conclusion

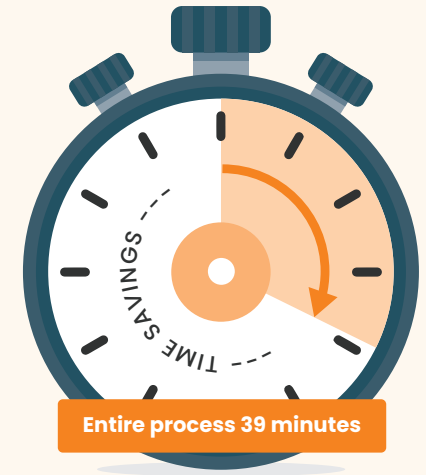
Managing an FMLA case end-to-end is a time-consuming, complex process without leave technology. Many HR professionals find themselves relying on spreadsheets, email reminders, post-it notes, and gathering data from multiple systems. They can easily spend hours making sure they send the right forms and communications at the right time, verify critical details, make accurate decisions, and track multiple leaves. With so much time spent on administrative tasks, leave managers are left with little to no time to interact with the employees in their care.

This situation leaves much to be desired by everyone involved. **By integrating leave management software into the FMLA process, leave managers can simplify, streamline, and optimize nearly all of the tasks involved.**

The risk of a lawsuit or fine is greatly reduced as well, because leave managers are equipped with the technology they need to deliver a consistent, well-documented, and fully tracked process. By spending 66% less time on FMLA management tasks, leave managers get time to focus on what's most important: caring for their employees.



Manual Case Management & Letters



Leave Management Software

To learn how AbsenceSoft can transform your FMLA management, we invite you to schedule a demo at absencesoft.com



AbsenceSoft