

HRA Medical Leave Without Pay (LWOP) Checklist

Name: _____ Agency: _____ Employee ID: _____
 HRIS Leave Code: _____ Supervisor Name: _____
 Is this Worker's Comp Related? _____ FMLA Eligible?: _____

Note **current benefit elections** below for quick reference, as needed, from "V" screens in HRIS:
 Health Code _____ Dental Code _____
 Life Code _____ Flex _____

*****CURRENT PAY PERIOD AND/OR CONTINUOUS LEAVE*****	
<input type="checkbox"/>	(1) Enter employee information into LWOP Tracking Spreadsheet
<input type="checkbox"/>	(2) Review and/or Write (W) time sheet
<input type="checkbox"/>	(3) Determine LWOP start date: _____ Anticipated Return to Work date, <i>if known</i> : _____ Does the employee have donated leave OR leave retention? <i>(If yes, follow appropriate process)</i>
<input type="checkbox"/>	(4) If FMLA eligible, compare time sheet to LeavePro (Reed Group (RG) records) If time sheet and RG do NOT match exactly, HRA to engage the Supervisor to clarify employee's leave time, as needed, which may include: <ul style="list-style-type: none"> - Employee accurately updating his/her time sheet, if incorrect - Employee updating RG with accurate FMLA use, if within 2 business day window - Supervisor updating RG with accurate FMLA use via email, if within 14 calendar days - Emailing FMLA@iowa.gov to designate employee's FMLA with RG if beyond 14 days Once the time sheet and RG reporting match <u>exactly</u> or the Supervisor has updated RG with accurate FMLA use: add remarks (including if an email was sent by Sup to RG) and approve time sheet.
<input type="checkbox"/>	(5) Determine appropriate leave code and write 501 P1 to move employee into code if LWOP appears to be on-going. P1: _____ <i>Reminder: check whether or not hours will pay on time sheet during current & future pay period(s) – also check for <u>holidays</u>, is EE eligible to be paid for holiday and/or does the time code in HRIS need changed?</i> <i>Reference the Leave Code Chart: Leave Code Chart & Definitions and PI Types</i>
<input type="checkbox"/>	Determine if leave balance will be paid out on time sheet. <ul style="list-style-type: none"> • If an employee's usable leave balances total greater than ten (10) hours, or if the leave balances total less than ten hours, but the employee has hours worked, enter the leave balances on the timesheet or PAYN. • If an employee's usable leave balances total ten (10) hours or less and the employee does not have any hours worked, do not enter the hours on the timesheet or PAYN. Write 846 P1 to pay out small accruals & 271 P1 to zero accrual banks. P1s: _____
<input type="checkbox"/>	(6) Determine if a benefit impact is / will be occurring based on LWOP hours, benefit elections and the deductions calendar: Insurance Deductions Schedule <ul style="list-style-type: none"> - Send "Resources Packet" to EE and Supervisor (<i>if not prev. sent already</i>), include: <ul style="list-style-type: none"> o Extended Leave AND/OR Long Term Disability (LTD) information o Life Event Matrix – is EE elig to cancel or change coverage at this time? o No impact: LWOP Insurance letter <u>with resources</u> and no collection language o Impact: include collection language in LWOP letter and resources Important: track discussions, information distributed (email/letter) and dates on LWOP tracking spreadsheet NON-FMLA Reminder: If EE is off work for 30 or more full days in LWOP status they would NOT be eligible for state shares for the month following their last day in paid status – eligibility would resume the first of the month following the EE's return to work.
<input type="checkbox"/>	8 Week Letter - consult with agency P.O. to determine if this needs to be sent <ul style="list-style-type: none"> - If sending: P.O. and Supervisor will determine 8 Week Letter communication to employee; employee will work with his/her provider to provide medical certification by deadline P.O. advises - If not sending: follow guidance from P.O. – continue to monitor and re-check with P.O. about every other pay period
<input type="checkbox"/>	Continue to monitor LWOP and track updates on LWOP Tracking Spreadsheet

*****NEXT PAY PERIOD*****	
<input type="checkbox"/>	Determine if leave code change is needed and update on 502 P1, as applicable - - - SKIP if N/A <i>Example:</i> changing from maternity leave (personal medical - code 54) to bonding time (FMLA fam - code 53)
<input type="checkbox"/>	Were P1s done in the prior pay period to zero balances? (See page 1 for criteria reminder) - If no , P1s 846 and 271 to pay out accruals and zero balances, if applic P1s: _____
<input type="checkbox"/>	Begin initial process again: review and/or write time sheet
<input type="checkbox"/>	Follow Collections Process and timelines determined – collect premiums / conduct follow-up - If checks are received for insurance payments – follow insurance billing process using the Insurance Billing Resources HRA site - Continuous tracking on LWOP Tracking Spreadsheet
*****EMPLOYEE RETURNS <u>OR</u> CHANGES TO INTERMITTENT LEAVE*****	
<input type="checkbox"/>	Did the employee return to work full-time? - If yes , <i>*Request confirmation the Supervisor received the employee’s Return to Work Form - add remarks to time sheet with eff date and any pertinent (reduced work schedule, for example) details*</i> ▪ If RTW note has not been received, discuss with P.O. as appropriate ○ Write either 520 P1 to return employee from leave or if intermittent absence is expected to potentially continue upon EE’s return, move to code 57 P1: _____ ▪ Return EE fully from leave after 1-2 pay periods of no LWOP on his/her time sheet. ○ If FMLA, re-check LeavePro and add remarks from LeavePro info on time sheet ○ Note in IowaBenefits the employee’s return (if changes were made) - <i>If the EE’s STEP increase date was missed while EE was on leave – refer to the return from leave P1 description to appropriately handle with Supervisor</i> - If no , and if employee is returning with a reduced work schedule – Write P1 502 to change leave code to intermittent 57 (if not already) and note time sheet P1: _____ - If no, and if employee is terminating – consult P.O. and follow applicable termination process, which includes receiving the employee’s resignation, a separation notice and completing a termination P1 401 **Will also need to collect insurance premiums, as needed**
<input type="checkbox"/>	If employee is on an INTERMITTENT leave repeat steps 2-4 noted on page 1 every pay period while continuing to track and monitor on LWOP Tracking Sheet High Level Summary of steps 2-4: - Review time sheet, and if FMLA: review LeavePro - Connect with Supervisor, if needed, to verify if LeavePro/time sheet do not match - Determine if there is a benefit impact – review/discuss life event matrix and/or collect insurance premiums
<input type="checkbox"/>	Continue to monitor and track until or unless one of the following: - Employee returns to work full-time OR goes on continuous leave - Employee terminates - - <i>reference Termination Checklist for next steps</i>
<input type="checkbox"/>	Upload documentation, as applicable to appropriate repository: FMLA/Work Comp or Personnel File