

Location	WebEx
Time	10:00 AM – 12:00 PM
Attendees	Department Representative: Carla Reyes, Paid Family and Medical Leave Director Employee's Interests Representative: Joe Kendo Employee's Interests Representative: Maggie Humphreys Employee's Interests Representative: Marilyn Watkins Employee's Interests Representative: Samantha Grad Employer's Interests Representative: Bob Battles Employer's Interests Representative: Christine Brewer Employer's Interests Representative: Julia Gorton Paid Family and Medical Leave Act Ombuds: Edsonya Charles
Guests	PFML Operations Manager: John Mattes PFML Communications Manager: Clare DeLong PFML Product Owner: Matt Buelow PFML Assistant OMBUDS: Wendy Galloway
Members Absent	Employer's Interests Representative: Tammie Hetrick
Scribe	Liz Merrick / Barbara Lember

Welcome and Introductions: Carla Reyes

Approve October & November Meeting Minutes

Five Advisory members have approved revised October meeting minutes. Carla asked revised meeting minutes to be sent out electronically to make sure all Advisory members can review and approve electronically.

Advisory Committee suggested some edits to the November meeting minutes, which will be sent out electronically for Advisory member approval. Advisory members would like to see the notes reflect that the Advisory Committee would like the Department to work toward the goal of processing applications within a one-week time frame. Carla agreed to adjust the notes to reflect the Advisory Committee's recommendation. She confirmed that the current goal for application processing is within two-weeks of a complete application though the team will try to process them sooner if that is possible. Again, there is great demand for this new benefit, so the volume of applications will impact how quickly they are able to be processed.

ACTION Carla: Add to the November meeting minutes: "The Advisory Committee would like the department to work towards the goal of processing applications within one week."

Update on Benefits Version 1.0 Launch – Matt Buelow

Matt shared that based on the current system and operational readiness assessments, both the Executive Steering Committee and the Office of the Chief Information Officer have supported a "GO" for launch. There are still tasks to be completed but the program is on target for launch of Benefits Version 1.0 on January 2, 2020. The cutover from test environment to production environment will begin on Friday, December 20, which may take several days. The system will be unavailable for public use while work is under way to complete the process to make the

production environment ready for benefits processing. Again, the department is on target for launch of the system with Benefits Version 1.0 on January 2, 2020.

Joe asked if a birth certificate is mandatory documentation for family leave? There is concern that if this is true it will be a barrier because it often takes weeks for an official birth certificate to be produced. Matt clarified that WAC does not require a birth certificate but allows the department to request one. It is likely that the standard operating procedure would be to request proof of birth (beyond the required medical professional certification of the existence of a qualifying condition) if there is some reason to question the claim. For instance, if we receive information that a person did not in fact have a baby, we might need to get verification to clarify any discrepant information.

Bob asked if the system will be ready for the public on Friday (December 12, 2019). Matt explained the system will begin the deployment process on Friday. The Department is feeling positive that employees can apply beginning January 2 and cautioned there is always a risk with any new system that a problem could arise during the load into the production environment; however, there is no indication that this will be the case. The department believes we are on track for launch by January 2, 2020.

Samantha asked if the screen shots of the online system have changed since they were last sent out? Matt did not believe there were significant changes.

ACTION Matt: send out current screen shots by the end of the day to the AC members (completed December 12, 2019).

Launch Materials - Clare DeLong

Clare reviewed the key materials and their status:

- Planner guides on www.paidleave.wa.gov/2019
- Benefit guides will be posted by January 2, 2020
- Website refresh anticipated before January 1, 2020
- Employer toolkit updated and found on www.paidleave.wa.gov/employers
- How to apply to be posted on January 2, 2020

Marilyn asked when website re-design was done. Before it was very easy to find rules. Now it's difficult.

ACTION: Clare to follow up with policy staff to see if it's on the engagement site or the www.paidleave.wa.gov site. (done)

Clarification provided December 12, 2019: The link at the bottom of the paidleave.wa.gov site now leads directly to our primary rulemaking site. It contains all final and draft rules that have been filed and represents the latest and most accurate information regarding Paid Family and Medical Leave rulemaking. Policy did this to avoid having to update this information in two places.

Edsonya is still getting some questions regarding FMLA and Paid Leave on language interplay. Clare mentioned that this is a challenge as we don't administer FMLA.

ACTION: John to follow up on the talking points that Customer Care Team are using for the FMLA interaction.

Launch Events - Clare DeLong

Clare reviewed the scheduled events (see slide).

Marilyn and many other Advisory Committee members would like to assist with engaging partners into Ambassador program. Clare will send Advisory members information as this program develops in the spring. Samantha has 18,000 health care workers in the union who would like to help. Joes would be interested in reviewing the strategy for the plans.

Open Comment

Carla Reyes shared an update on the budget and Decision Package noting Paid Leave is part of the Governor's Budget. The request is to increase the expenditure authority largely for customer care staffing to ramp up through 2023 in alignment with benefit claim projected growth. The request does not seek General Fund-State investment as the expenditures will be funded from premium collections. The request will also not increase the premium rate. Existing budget projections anticipate the rate would increase from .4% to .5% in FY25 and then return to .4% in FY26. While this expenditure authority request will not increase the rate, it will shift the one-year bump so the rate would go to .5% in FY24 and return to .4% in FY25. It will not result in an increase of the premium rate.

ACTION Carla: place this topic on the January meeting agenda.

The Advisory Committee would like to know ASAP if there are any glitches in the system that will result in failure to launch as planned so the committee can rally in any possible way to help. Carla committed to providing weekly updates to Advisory Committee members through January. She will include "RED ALERT" in subject line if something needs Advisory Committee members urgent attention.

Samantha suggested she would like to have a list of contacts.

ACTION: Carla to send the AC members a contact list for the members to use by the end of the week. (done)

Edsonya asked for an update to the annual reviews of Voluntary Plans. Finishing touches are being done to the plan.

ACTION: John to send this out by the end of the week. (done)

[Voluntary Plan Annual review update \(as of December 20\).](#)

As a reminder not all plans are up for annual review currently which is why the numbers won't match totals we reflect elsewhere.

Approved:	28
Lead/Manager review:	25
Withdrawals:	2
Needs review by Specialist:	9
Waiting on ER revisions:	86
Current number of VP to review:	126

Alley Scosman – Pacific Resources:

1. November slide regarding hold times shows down in September to October How many staff were added to drive that reduction? Is that the reason for the reduction or were there other actions that impacted the times? John clarified that new staff did not begin until October 1, 2020. We hired three new teams between October 1 and November 30, 2020. These staff were not on the phones yet in October. It is likely the reduction in wait times is the result of working through a learning curve—both for our customers and our staff. Also, as we identified challenges or bugs in the system, we worked to implement fixes that would aid with challenges. Looking ahead to January, all Customer Care team staff are cross trained to be able to process benefits and support employer reporting. This means our full staff contingent will be able to support both customer bases in January as it is both a reporting month and the beginning of benefits processing.
2. IRS tax – Realize that we don't have an answer yet and PFML is working on the issue, but it's a big concern that employees and employers won't know how to deal with disability / taxability.
Carla confirmed that we sought a ruling from the IRS on the taxable status of paid leave benefits. The IRS responded that they would not be issuing a ruling on our request, but they are looking at the issue as a future priority. The department worked with the Congressional Delegation and a letter was sent urging the IRS to issue a determination. At this point, we will include information on our website that customers should be aware the IRS may later determine the benefits to be taxable, that this may have impact their tax liabilities. We cannot provide tax guidance but would suggest to customers that they should consult their tax professional with questions about tax implications.
3. Any type of guidance on benefit waiting period? Clare shared that information on waiting periods is in the benefits guide. Clare is happy to consider changes if there are ideas about how else we might make this information clearer.

Sally Grabman – Providence Health Care: From a recent Webinar there is a confusion about the 30 day wait period. How does a large employer monitor? Carla said the goal is for PFML to make a decision on applications within 2 weeks; although the demand will impact the actual

turnaround time. Employees and employers will be notified of the decision via letter. Sally asked for clarification on who is notified if they have a third-party administrator taking care of payroll? Matt clarified that we would send notification to current the employer(s) we have on record. Sally asked if the Department would provide information about the average processing time.

Carla said that PFML will be providing regular updates on processing statistics to the Advisory Committee at the monthly meetings. Data presented at Advisory Committee meetings will then be posted on our website in meeting minutes.

Trish- Lincoln Financial Group: There is confusion about how minimum claim duration aligning with waiting weeks and intermittent leave. She asked if there is any proposed legislation that would adjust waiting week, intermittent leave or how the two interact. Neither Carla or Edsonya were aware of any proposed legislation for 2020 related to this issue. Edsonya will plan to monitor this and other pain points and it could be something that is queued up for consideration in future legislative sessions.

Edsonya asked if we are alerting Customers that the benefit could be taxed? Clare said that information on this topic is included in the Benefits Guide. Again, we cannot provide tax advice but will let people know that the benefit could be taxable.

ACTION: Clare- Confirm whether information about taxability is also included in Web guidance and/or FAQs.

Shannon Wallace: Are mandatory posters available? Clare confirmed the will be available for download from our Website before January 1, 2020 and will be available to mail out as well.

Marissa Mayfield with Lincoln Financial Group: What information will be provided to employers about applications? Carla explained once the application is received then current employer(s) and employee are notified. The current employer(s) will also be notified when an application is approved or denied. Employers will be provided the employee name, last 4 of the social security number and that they applied (at time of application), that they were denied (if denied) or were approved and the duration approved for the claim (if approved). If employers would like additional information, they can access that information either from the employee or the employee can grant the department authority to provide additional information. If there is an appeal, employers may receive more information in that process.

Will the correspondence be by mail only? At January launch yes, only by mail. A future enhancement will be to give people a choice of how they want to receive communications-- either via secure electronic messaging or by postal mail.

Maggie asked if there are example of forms/letters on the website? Clare responded that this hadn't been considered yet, but if it's helpful we can put examples of the forms on the website.

For Voluntary plans reporting, the Department does not have any plans currently.

Gina Rutledge – MetLife: To whom will the department mail notifications? Right now, PFML populated our system with information about businesses from Department of Revenue.

Employers could have gone in and changed that on their accounts. We will mail to the contact information as it exists at the time of application. If filed by a third party, is there a way for employer to change so there are different or multiple contacts for different purposes (example, one contact for filing/reporting and a different contact for benefit notifications)? Matt clarified we anticipate adding the capability in a future release for an employer to identify multiple points of contact. Is there a Benefits calculator on line that gives times and rates? Clare confirmed there is a benefit calculator and it will display an estimate of what a weekly benefit amount would be given the information entered into the calculator.

Alley Scosman – Pacific Resources: She has an employer who has been waiting 10 months for a pin number. How can this be sped up? John urged this employer to call the Customer Care Center so that we can assist.

Carla confirmed that Advisory Committee members would see follow up items this week, that she would send out any critical issues as Red Alert between now and launch and that she would send a weekly update on key data points for the month of January. The next meeting is Friday, January 17, 2020. Since this is during legislative session the meetings for January through March are scheduled for only an hour, moved to Fridays and will be held at the DSHS OB2 building on the Capitol Campus.

Meeting Close

Next meeting: Friday, January 17, 2:00 pm – 3:00 pm | Department of Social and Health Services / Office Building 2 – Lookout Conference Room, 4th Floor | 115 Washington Street SE, Olympia, WA