

<b>Location</b>	Teleconference
<b>Time</b>	10:00 am – 12:00 pm
<b>Attendees (all on the phone)</b>	Paid Family and Medical Leave Interim Director: John Mattes Employee's Interests Representative: Maggie Humphreys Employee's Interests Representative: Marilyn Watkins Employee's Interests Representative: Joe Kendo Employer's Interests Representative: Tammie Hetrick Employer's Interests Representative: Bob Battles Employer's Interests Representative: Julia Gorton Employer's Interests Representative: Christine Brewer Paid Family and Medical Leave Act Ombudsman: Edsonya Charles
<b>Guests</b>	PFML Interim Operations Manager: Leah Coberly PFML Data and Research Manager: Rebecca Grady PFML Business Systems Product Manager: Matt Buelow PFML Policy Manager: April Amundson
<b>Members Absent</b>	Employee's Interests Representative: Samantha Grad
<b>Scribe</b>	Linda Kleingartner

**Introductions** - Members introduced themselves.

**July and August Meeting Minutes** – both approved.

**2021 Premium Rate** – Rebecca Grady shared the 2021 Premium Rate will maintain at 0.4%. She shared how the calculations were derived (slide 7). She provided additional context around how the rate was able to remain the same, noting it was extremely close. While there were higher benefit claims/payments this year there was also higher premium payments than the original pre-implementation projections thus far.

Given this is an annual cycle and are unable to calculate the premium rate before October 1 by statute, Rebecca asked for feedback around on the process followed this year. The general feedback from the Advisory Committee is the cadence felt right. Bob Battles didn't have a comment on the process to get to the rate but is interested in how the Department will handle the communications when the rate changes. Rebecca shared the team prepared a robust communications plan in the event of a rate change. Edsonya Charles asked that Advisory Committee is informed before it goes to the public. Rebecca noted the team will add this feedback into the next year's communications plan.

**Program Report to Legislature (12/1/2020)** –Advisory Committee members will be getting the draft for review by Monday 10/19/2020. The Advisory Committee review period is 10/19-10/23/2020. Rebecca will provide instructions in her transmittal of the draft report.

**Customer Service Processing Update** – Leah Coberly presented the application and weekly claim data (see presentation slides 11 through 14) through 10/10/2020 noting there has been little fluctuation, for example 1% increase in applications received.

Paper Applications: Data provided on the number of paper applications received by language (Spanish, English, Chinese and Vietnamese). Leah noted there are bi-lingual (Spanish) Customer Care Team specialists, and when needed use of a translation service is also available. The Advisory Committee inquired whether there is a delay for non-English paper applications given the potential use of translation service. Leah explained the data does not support that there is a delay in serving non-English speaking customers. One exception was a period where all paper documents mailed to the Department, which require imaging & routing, caused delays for all customers (during the massive influx of Unemployment Insurance claims between March-May 2020). She reinforced there is no backlog at this time.

**Action Leah:** include a data table for the weekly applications in future presentations to provide a better view of the trends.

Processing Times: The team continues to meet the 2-week processing goal, as shown in the average and median weeks processing time for applications processed for past 10 weeks (slide 15).

Denial reasons: Period between May – September 2020 (slide 16). Leah explained the majority of these claims were denied for just one reason, but there were a few that had more than one reason they were denied (provided bar graph to illustrate). An example of this would be if a claim was denied because the Employee didn't provide sufficient documentation and didn't respond to our requests for the information. Another example of why there are three denial reasons: The Employee did not work the required 820 hours, there was no medical certification and there were no responses to our requests for this information. Committee members requested the following denial reason definitions:

- “Did not meet minimum qualifications” represents the 820-hours requirement, or a qualifying event.
- “Qualifying event did not occur” are mostly customers who applied early.

Fact finding is conducted on all these claims prior to denial. Fact finding process: the assigned Specialist reviews the information that is in the file and reaches out to the employee and/or employer. They reach out via phone first and if they do not reach the person, the Specialist will send a letter asking for the missing information. The employee or ER is given 14 days to respond to the letter. If there is no response, a determination is made.

Marilyn Watkins asked about the information an Employee is provided when they are denied. Leah shared they get information outlining the specific reason(s) why the claim was denied.

Related to communications sent by the Department, Bob shared feedback that Employers are getting confused by the multiple letters they receive. April Amundson clarified the process around employer notification. She acknowledged there will be different types of communications sent, based on the progress of the Employee's situation. Initial communication provides the approximate dates the employee will be on leave. Then later a guidance letter is provided with a date range. April shared the department has been discussing how these letters can be confusing and how difficult it can be when employers don't know the details. She also noted the Department will communicate after the fact because of the 4-week reporting in arrears. There is nothing in the law that prohibits an employer to work directly with their employee around their intentions to return to work. Bob Battles and Edsonya Charles both noted this is a real employer concern. The team commits to look at this.

**Action April:** future Advisory Committee agenda topic- Employer Notifications.

Call data: The volumes continue to be very high (slide 17). Leah acknowledge the number of calls we are answering are not where we want them to be (referring to the gap between the Calls presented to the Customer Care Team and those that actually get into the queue (Calls Presented), and of those calls (in the queue) that get answered). There has been some work around trying to mitigate this – a work group took the most common FAQ to find ways to proactively push the information to the customers (Advisory topic in August) with the goal to reduce the need of all customers having to contact us by providing information through self-service. This should free up the phones for those that need to contact us. Also, the Team is studying what other states are doing and what has worked for them to leverage this knowledge and experience with our current work model and technology platforms.

Emails: Of the 170K received between January through September, there is a backlog of just over 6K (slide 18). Leah has focused resources to get these emails cleared; these efforts will continue but may fluctuate dependent on the volume of benefit and weekly claim applications.

Power of Attorneys: there is no current backlog (slide 19). The delta between submitted / resolved (200) is due to a status-update that wasn't made.

Conditional Waivers: there is no current backlog (slide 20). The reason for the spike is the conflux of COVID, Imaging Team (shared with agency) and move to telework caused an inordinate strain on the mail documents. This has been resolved.

Voluntary Plans (slide 21): Overview of the preliminary applications received by type of plan, completed applications and fully processed. Bob was curious whether the number of employers holding the annual plans have declined. Leah shared the majority of the employers are continuing with their own plans.

Elective Coverage (slide 22): numbers of the active Independent or self-employed contractors who have opted into the program (not submissions).

Bob asked what functionality still doesn't exist in the system. Matt Buelow responded the ability for Employers to voluntarily pay their employee's portion of the premium is not yet available. Bob is concerned this functionality is still not available. Matt responded he has not heard from employers who would like to voluntarily pay for their employees, and it is not a prerequisite to applying for or getting a small business assistance grant

**Small Business Assistance Grants** – Bob stated the small business assistance grants is an incentive to get independent or self-employed contractors to participate in the Program, and he is frustrated that this functionality is still not available. Julia reiterated that many employers want to participate in the program. Matt shared that employers do not have to opt in to be eligible for grants small businesses will be able to apply retroactively. When asked whether the business will also have to pay their premiums retroactively, Matt clarified their 3-year commitment period begins when they receive the funds from the grant application.

Matt covered the status of the work to provide small business assistance grants, still targeting the end of the year. The Communications plan will be shared in advance of the November meeting, and will be on the agenda next month. Bob said the intent of the Small Business Assistance Grants was to provide the money at the time of need and does not understand why it is not available now. Matt outlined the complexity around the design and development for the new functionality of the grant assistance application and payment. The Advisory Committee is frustrated the functionality is not in place, offered their concerns, stressed the importance and priority of the grant program. John Mattes assured the Advisory Committee of this priority effort and commits to contact the Advisory Committee if we look to be off track for the end of the year deadline.

**New Functionality released and upcoming release** - Matt Buelow covered the new functionality serving external customers released over the past three months and planned in the near term (slides 24-25).

**Website Updates** – Matt highlighted the planned improvements for the website (launched in 2018). He and Alison Eldridge, Product Manager, featured how the navigation will be improved, the addition of a Help Center which consolidates forms, and enhancement for language access (refer to slides 26 - 29), which include providing all applications in the 11 supported languages. Alison shared the site is also translated to Spanish. The team is looking at options to translate required forms, so they are downloadable. Matt clarified there is no online application available in any language other than English.

The Advisory Committee requested the ability to review the language proposed for the site, noting they have had concerns with the explanation of things (e.g. medical leave and how it relates to pregnancy, bonding leave, confusion around the extra 2-weeks with a serious complication) in the past. Alison assured Advisory Committee that the team did perform extensive usability testing with the public, and this feedback largely informed the website redesign.

**Action Matt:** Gather specific proposed website language for the following areas: medical leave and how it relates to pregnancy, bonding leave, confusion around the extra 2-weeks with a serious complication.

**Action John:** provide Advisory Committee the opportunity to review the information Matt prepares to the Advisory Committee (10/19-23).

### **Open Comment –**

John Mattes offered a few updates. The Director position has closed, and the Department is in the initial stage of preliminary interviews. The Paid Family and Medical Leave implementation project won a national award for the technology (NASCIO). Sought the Advisory Committee's input on the 2021 Advisory Committee meeting cadence.

**Advisory Committee Decision:** Monthly meetings in 2021 until the whole program is in place. For meetings during session Bob speculates that hearings may move into Friday afternoons, and will need to flex accordingly.

**Action Liz/ John:** send out the list of the proposed dates for Advisory Committee

Magdalena Loza (relayed by Advisory Committee member): having problems calling the Customer Care Center (recording indicates to call back during regular business hours even though it is during business hours, and then disconnects the call). Leah said the team is working to improve the phone messaging.

**Action Leah:** Improve the messaging that is displayed when the phone volume is high

Ali Schaafsma offered two comments:

- Reiterated the challenges with the employer notification letters and the need to provide employer tools they understand and informs where their employees are in the process. Focus on what access employers can have (what information can be provided) and simplify the employer communications.
- Would like a future meeting topic to be an update on the annual review process for employers with private plans.

Shannon shared some of her clients have a voluntary plan they plan to operate and did not get a notification process (reminder) from ESD on what they need to go through. Clarification for the employers would be helpful; it is not noted in the voluntary plan guide.

**Next Meeting:** Thursday, November 19, 10:00 am - Noon | This meeting will be held via WebEx.