



Disability Management Division

Presagia Training Manual

January 2018



PRESAGIA Enterprise

Presagia Introductory Training Workbook





Presagia Introductory Workbook

Overview

This document is intended to guide leave case managers (LCMs) and related personnel through the Presagia leave case management system.

Philosophy

Presagia is a decision support system designed to gather all information about a need for leave and present the LCM with any applicable policies, determine eligibility, assess available entitlement and help the LCM make a decision. The system always defers the users' expertise and allows them to override its decisions when an LCM deems appropriate.

The Presagia system is designed to automate the routine and mundane tasks of managing leave (summing hours worked, tracking due dates, generating correspondence), which allows the LCM to focus on the human aspect of leave management (interacting with EE, verifying denied eligibility recommendations, etc).

Lesson 1 - Toolbar Overview

Home · Employee search · Cases · Worklist · Knowledge base · Reports · Dashboard



This lesson introduces LCMs to the Presagia's interface and briefly describes each of the visible menu items:

- **Employee Search (Basic and Advanced)**
 - Allows the user to search for an employee (or group of employees) to manage/begin leave requests.
- **Cases (Basic and Advanced Search)**
 - Allows the user to search for current Cases.
- **Worklist**
 - Allows the user to search and manage all current To-Do's across all open cases
- **Knowledge Base**
 - (Reference) Library of Federal and State policies that are currently being managed in Presagia.
- **Reports**
 - Allows the user to generate functional reports using data in the Presagia system
- **Dashboard**
 - A visual representation of all aggregate data within the Presagia system
- **Help Manual**
 - Link to Presagia's system help and Use Cases for leave management purposes.
- **Home**
 - Interface that allows the user to access numerous system (quick) functions in one place.



Lesson 2 - Detailed Navigation

This lesson is a detailed introduction to each of the navigation screens introduced in Lesson 1. This lesson will give LCM's a good understanding of how the Presagia system works.

Exercise 1: Perform (basic & advanced) Employee & Case searches.

1. **Basic** Employee Search

- a. Click the **Employee** link in the navigation header. The search results list all employees the user has access to, and allows simple keyword or advanced searching options
- b. To list a random sample of employees, click the Search button while leaving the input field empty; the results will appear below the search field. Do keep in mind that if you are managing more than 100 employees, the system is set to display a random set of employees.
- c. To find a specific employee, enter the employee's First or Last Name (not both), Employee ID
- d. To sort the results, click any column header to sort by that column.

2. **Advanced** Employee Search

- a. While on the Employee search page, click **Advanced search**
- b. Enter (any number of) advanced fields, including (but not limited to):
 - i. First Name
 - ii. Last Name
 - iii. Gender
 - iv. Employee Number
 - v. Geographic Location
- c. Once entered, click Search
- d. To sort the results, click any column header to sort by that column.

3. Locating **Inactive** (Retired) Employees

- a. Searching inactive employee, requires the use of the **Advanced search** feature
- b. Locate the **Retired Status** dropdown menu and select Retired (or Both)
- c. Complete any additional search field required to locate the employee(s)
- d. Click Search to generate the list of retired employee(s)

4. Saving a Favorite Search

- a. Enter all **Advanced search** criteria into the available fields (described above)
- b. From the **Favorite Searches** dropdown menu, select **Save current criteria**
- c. The system will prompt you to enter a description
- d. The search is now available for use from the **Favorite Searches** dropdown menu
- e. Your Favorite searches can also be edited/deleted using **Manage Favorite Searches**



Exercise 2: Setting up a (Global) Worklist

1. Setting up a Worklist – Weekly To-Do List

- a. Click **Worklist** in the Navigation header
- b. Select the **Worklist items** (WLI) the system will search for (ex. Print and Send Items and Case Management)
- c. Select the Active **WLI Status** (To do, In Progress and On Hold)
- d. Select the assigned LCM using the **Assigned to** field
- e. Set the WLI **Due Date** - Select this week (or next seven days)
- f. Click Search to generate your worklist item list. In the results, anything in blue is a link and allows you to manage cases directly.
- g. Click the Launch button on the far right of each WLI to begin the associated workflow, or wizard.

Exercise 3: Edit and Create a Report

1. Reports Module

- a. Click on the **Reports** in the Navigation Header
- b. You are now in the Report Module, notice that it is divided into two sections:
 - i. Pre-Made Reports (Fully functional reports available to LCMs within the system)
 - ii. Report Types (Used to create ad-hoc reports)

2. Pre-Made Reports

- a. To Launch a pre-made report, locate the desired report and click on its Name (it is highlighted in blue)
- b. To Edit a pre-premade report, hover your mouse over the name and click the Pencil icon that appears
- c. To Run a pre-made report in the background, hover your mouse over the name and click the Magnifying Glass icon that appears
- d. When a report is run in the background it will appear on the Home page

3. Report Builder Overview

- a. The Report Builder is accessed by either **editing** a pre-made report or by clicking on a report type.
- b. From the builder, an LCM may:
 - i. Create a new report
 - ii. Change an existing report
 - iii. Delete a report

4. Run a Report



Lesson 3 - Creating a Leave Request

This lesson is a basic introduction to the Request a Leave (RAL) wizard. For the purposes of this lessons, choose an employee (EE) who doesn't already have an open leave cases.

Exercise 5: Request a new leave for medical/ self

Requesting a Continuous Leave (Intake Phase)

- Locate an Employee
 - See **Lesson 2 – Exercise 1**
- Open the **Employee Summary**
 - Click **Select Action**
 - Choose **Request a Leave**
 - The wizard will open; beginning with Reason for Leave
- Reason for Leave
 - Select at least one of the five leave reasons, if none apply use Other (In this example use Medical serious, non occupational)
- Case Information
 - Enter the Date and time the request was received
 - Enter the First expected date of absence (First day away from work)
 - Enter the Last expected date of absence (Last day of absence, day before RTW)
 - Ensure the relevant employment profile is selected
 - For a Continuous Leave do not check Intermittent
- For an Intermittent Leave check the box marked "Intermittent"
- Absence Schedule
 - Enter the Last expected date of absence
 - Enter the Anticipated Return to Work (RTW) date (Can be left blank, the system will try to suggest a RTW date; click Accept to use the date provided)
 - For a Continuous leave enter the expected date(s) of Full day absences (ex. March 1 , 2017 – March 19, 2017)
 - ✦ For an intermittent leave request, you may add/enter any expected or known dates of absence. Otherwise, the absence schedule can be left blank.



- Late Notification (Optional. This can be deactivated)
 - If this screen appears, please enter the Reason for the late notification
 - Click Next
- Confirmation
 - Review the information as entered, looking for errors
 - Click Submit (Changes are only saved the request has been submitted)
- Case Number
 - The **Case Number** will appear on the left-hand side of the screen, click it to open the new leave case

-Final Note-

You have now successfully requested a leave. The newly created case will now contain all of the requested information and your (case) **Worklist** will show the next steps in the workflow and their associated due dates.

The **Confirm Eligibility & Entitlement** wizard seen in each newly requested case will walk you through the assessments of:

- The **Applicable** policies in the case
- The Employee's **Eligibility** for each of the above policies
- The remaining **Entitlement** under each of the above policies

The result of a submitted **Confirm Eligibility & Entitlement** will be an auto-generated letter describing the current status of the case, important dates and any requirements to approve the leave. The sending of this correspondence marks the first milestone (break) in the Presagia Leave process.

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Presagia Advanced Training Workbook





Introduction

This document is intended to guide Leave Case Managers (LCMs) and related personnel through the Presagia leave case management system.

Lesson 1 – Continued Leave Management

The continued leave management section will introduce LCMs to leave management techniques that will allow them to get the most out of the Presagia system.

Exercise 1: Requesting an intermittent leave

1. Locate the employee
 - a. Find the employee in **Employee search** page using **Search** button
 - b. Open the **Employee summary** page by clicking on the found employee name
2. Request the leave
 - a. Open the **Request a leave** wizard by selecting it from the Select Action... drop down menu
 - b. Identify reason for leave on the **What is the reason of the leave?** page
 - c. Identify the relationship of the person for whom the leave has been requested to the requester, or the employee (Ex. Self, biological child)
 - d. Select the known/expected first and last dates of absence, and check the **Intermittent leave** check-box on the **Case information** page (If unknown put as much information as is known)
 - e. The return to work dates and associated optional conditions will not be required for an intermittent leave request
 - f. Only create an absence schedule on the **Absence Schedule page** if dates of absence are known at the time of request, if the schedule is unknown leave this section blank
 - g. Verify leave request at the **Confirmation page** and click **Submit** button to complete the request (Note: Nothing is saved until this step has been completed)
 - h. The system will then generate a **Case number**, click the link in blue to be open the newly created leave case
2. Eligibility and entitlement confirmation
 - a. Launch **Confirm eligibility and entitlement** wizard from *worklist items* section of the case
 - b. Review the leave dates listed on the **Review the leave dates being requested** page
 - c. If required, identify if the case is a reoccurrence of other open/existing cases or if it is relevant to any other cases on the **Recurrence check** page
 - d. Verify or modify if necessary the work schedule of the employee on the **Work Schedule** page
 - e. Verify the list of policies the employee is applicable for on the **Summary of qualifications** page, use the *Add Policy* button to add additional policies (ex. company policies) to the leave request
 - f. Verify the remaining entitlement for each policy for every day of absence at the **Policy coverage** page, if the employee will exhaust their entitlement you will be notified here
 - g. Review all the entered information at the **Confirmation** page and click **Submit** button



3. Sending initial correspondence to the employee
 - a. Launch worklist item Print and send: Initial Correspondence
 - b. Open and review the initial correspondence by clicking **View document in new window**
 - c. Print the documentation
 - d. Send by mail it to the employee
 - e. Click the **Has been sent** button
 - f. Click **Save/Go to** button
4. Receiving and reviewing certification
 - a. **Upload** the returned certification into the system
 - i. Click the '+' sign by the Correspondence header
 - ii. Fill in the **Mode** of delivery
 - iii. Fill in the **Status** of the delivery, this must be set to 'Received'
 - iv. **Name** the document, example 'Medical Certificate'
 - v. Upload a **PDF** scan of the document by clicking browse, locating the file, and clicking OK
 - vi. Click the **Save/Go to** button to complete the process
 - b. Launch Review Certification wizard
 - i. Select the certification status on the **Review certification** page, typically accepting the certification as complete and sufficient
 - ii. Select the recently uploaded **certification** from the drop down list prior to continuing
 - iii. Identify if the certification **supports the need for leave**, per policy (select yes or no)
 - iv. At the **Certification info** page, capture the certification information (Please ensure the intermittent check-box is selected)
 - v. At the **Intermittent conditions** page enter the information provided in the doctor's note in this page (There is a section to set the expectation for any known periods of absence and the frequency and duration of any anticipated flare up events; this information will trigger worklist items to generate if an employee is suspected of misusing their leave)
 - vi. At the **Absence Schedule** page, enter the dates if they are known when the employee will be away; otherwise leave this page as it is
 - vii. Review all recently entered information at the **Confirmation page** and click **Submit** to complete the wizard
5. Leave status updating
 - a. LCMs will be prompted to launch **Update leave status** wizard; this will allow users to approve the requested leave and generate the *Leave Determination* letter
 - b. Users will be returned to the leave case once they have completed this wizard



6. **Adding an absence to the absence schedule** (if creating manual entries, versus a file import)
 - a. Select Modify Absence schedule from Select action... drop down menu
 - b. Modify Absence Schedule by changing Last expected date of Absence and adding new rows
 - c. If this change extends the leave past it's current range:
 - i. Verify policies applicable for the leave dates at the **Summary of qualifications** for the new absence dates
 - ii. Verify Policy coverage
 - iii. Verify entered information at the **Confirmation page** and click **Submit** button
 - iv. Print and Send, then process any new case and do certification for extension of leave period

Exercise 2: Requesting an hybrid (mixed) leave

1. Identify your **desired type** of hybrid leave
 - a. Continuous leave case with periods of intermittent leave
 - b. Intermittent leave case with periods of continuous absence
2. **Continuous** leave case with periods of intermittent leave
 - a. Request the continuous leave following the steps previously introduced in the basic training workbook
 - b. To add a period of intermittent leave, click the **Select Action...** menu and select **Modify Absence Schedule**
 - c. Click the **Intermittent leave** check box, then enter the **effective date** (This is the date the intermittent portion of the leave will begin)
 - d. Enter any **known** periods of absence in the absence schedule, or leave it as is if the periods are unknown at the time of request
 - i. If the absence schedule extends the leave then a new certification will be generated, once sent and received the LCM will complete the certification process previously demonstrated
 - e. If the period of intermittent leave comes after the Return to Work Process has fired, it can be identified as an accommodation or an 'Other' reason; but the other steps will remain the same
3. **Intermittent** leave case with periods of continuous absence
 - a. Request the intermittent leave following the steps previously introduced in this training workbook
 - b. To add a period of continuous leave, click the **Select Action...** menu and select **Modify Absence Schedule**
 - c. Enter the period of known continuous leave within the **Add Row** portion of the screen, and update the last date of expected absence (if required to cover this new portion). If the absence schedule extends the leave then a new certification will be generated, once sent and received the LCM will complete the certification process previously demonstrated
 - d. If the period of continuous leave comes after the Return to Work Process has fired, it can be identified as an accommodation or as an 'Other' reason; but the other steps will remain the same



Exercise 3: Create a Pregnancy leave that transitions into a Bonding leave

1. Request the PDL Leave

- a. Locate the Employee
 - i. Launch the Employee Search
 - ii. Type in the Employee's First or Last name, Employee ID, or SSN
 - iii. Click **Search**
 - iv. Locate the Employee's name
 - v. Click on their name to launch their **Employee Summary**
- b. Request a Leave Wizard
 - i. Click the **Select Action** dropdown
 - ii. Select Request a Leave
 - iii. Select the **Leave Reason** – Pregnancy
 - iv. Enter the anticipated **Due Date** of the pregnancy
 - v. Indicate that the pregnancy is a serious health condition, by checking one of the check-boxes below the due date (important)
 - vi. Enter the anticipated **First and Last dates of Absence** (Best guess or best information known at the time of request)
 - vii. Indicate if the leave is **Intermittent** or **Continuous** (Checking or not checking the Intermittent box)
 - viii. Enter the **Anticipated Return to Work Date** and enter any periods of known absences in the **Absence Schedule**
 - ix. Complete the wizard and then **Submit** the request, creating the new PDL case

2. Process the PDL

- a. Locate and Open the Leave Case
 - i. From the Request a Leave wizard click on the **Case Number** at the end of the wizard
 - ii. Or, from the **Cases search**
 - i. Enter the Employee's First or Last Name, Case Number, or Employee ID
 - ii. Click Search
 - iii. Locate the Case
 - iv. Click on the Case and this will launch the appropriate Leave Case page
- b. Confirm Eligibility and Entitlement
 - i. Launch the Confirm Eligibility and Entitlement WLI
 - ii. Proceed through the wizard until the Summary of Qualifications, these pages are a review of the previously described process but it is the first time eligibility and entitlement will be calculated within the case
 - iii. The **Summary of Qualifications** is a grid of applicable policies for the case, If **no policies** are listed, or if they are all denied, you can click on *Add Policy* for additional policy options
 - iv. Confirm the information: check the EE's eligibility, conditions met, and status of all applicable policies. Additional information on each policy can be viewed by selecting the Show button.



- v. Click **Next** and continue through the wizard until you can **Submit** it (nothing will be saved or actioned within the system until you click submit)
 - vi. You will be returned to the leave case and the **Initial Document** will be generated
- c. Send the Employee the Initial Documentation
- i. Launch the **Print and Send** WLI
 - ii. Open, Print, and Mail the Letter (or Email)
 - iii. Once the letter has been sent, click **Has been sent**
 - iv. Click **Save/Go To** and return to the Leave Case
- d. When the Medical Certificate, or required Documentation, has been returned you need to enter it into the Leave Case
- i. Outside of the system you will need to scan the returned document as a PDF
 - ii. To add a Document Record for the Certification/Documentation click on the plus (+) sign near the word **Correspondence**
 - iii. Complete the **Mode** of Delivery, **Status** (Received), and **Document Name**
 - iv. **Upload** the Correspondence
 - v. To remove an incorrect document, click on Remove; this is the only place you can easily remove an incorrect document attached to a record
 - vi. Click '**Save\Go To**' and return to the Leave Case
- e. Review the Medical Certification, or required Documentation
- i. Offline, review the documentation and make a determination
 - ii. Launch the Review Certification WLI
 - iii. Indicate the decision and the identify the relevant documentation
 - iv. Each option will have its own workflow, all other options besides **accepting the certification** will look for additional information or deny the case (overdue certification)
 - v. Indicate if this is a **serious medical condition** (check at least one box)
 - vi. Indicate, per policy, if the **documentation is sufficient** (click the 'i' for the Knowledge Base Page regarding each policy if necessary)
 - vii. Complete the **required fields** concerning the documentation (Health Care Provider, Signature date, Certification start date, Certification end date, and Most recent documentation date). To add a **physician**, click on the plus (+) sign, click Add, and complete the requested information
 - viii. Confirm the Absence Schedule
 - ix. Submit the updated information
 - x. Repeat for each certification.
- f. Update leave status
- i. Launch the **Update leave status** WLI
 - ii. Confirm leave dates and policy coverage
 - iii. Submit leave status update – This will generate the Leave Determination letter



- g. Send the Employee a Leave Determination
 - i. Launch the **Print and Send** WLI
 - ii. Open, Print, and Mail the Letter (or Email)
 - iii. Once the letter has been sent, click **Has been sent**
 - iv. Click **Save/Go To** and return to the case
 - h. Create a Worklist Item (WLI) to check-in with the employee in advance regarding their ability to start bonding leave (Confirm the end of their medical need for leave related to the birth process)
 - i. Click the **Select Action...** menu from within the Leave Case
 - ii. Select **Add Worklist** Item from the Tools section of the menu
 - iii. Select **Case Management** from the Worklist drop-down menu
 - iv. Select the desired **Status** (To Do)
 - v. Set the **due date** 7-14 days prior to the end of leave
 - vi. Set Priority, Assigned To, and Notes if needed
 - vii. Fill-in the **Subject line**, as this will set the text of the WLI (ex. Confirm health status of employee prior to transitioning to Bonding)
 - viii. Click **Save** and your WLI will appear in the worklist
 - i. Monitoring tasks within the Leave Case, monitor the leave for typical case events and WLIs
 - i. Absence designations
 - ii. Entitlement exhaustion events
 - iii. Growing into entitlement
 - iv. Etc...
3. Transition to Bonding
- a. Confirm health status and wellbeing of employee
 - b. Transition Pregnancy leave to Bonding
 - i. Click the **Select Action** dropdown
 - ii. Select **Modify absence schedule**
 - iii. Select **Add row**
 - iv. Enter the expected absence for the Bonding leave starting from the day after Pregnancy leave (Pregnancy leave end date can be modified should recovery have been faster)
 - v. Modify **Last expected date of absence** and **Anticipated return to work date** based on the new leave
 - vi. Confirm there are no errors and proceed to the next screen
 - vii. Select **Leave type** dropdown and select **Bonding/Adoption/Foster Care**, and enter the child name
 - viii. Proceed and confirm policy coverage
 - ix. Submit the new leave information



Exercise 4: Selecting leave as an accommodation

1. When a policy is denied:
 - a. Whenever a leave is **denied** during the **Confirm Eligibility & Entitlement** wizard the user is given an option to apply for leave under ADA
 - b. If the leave case manager has determined that the applicable policies should be denied (not enough entitlement, not serious medical condition, certification does not support leave, etc) for medical leaves and changed policies status to denied at Summary of qualifications page, the system will **prompt** the leave case manager to review a case using **ADA Guidance** at **Confirmation page**
 - c. Users will be presented with a **drop down menu** with the following options:
 - i. **Review has not been performed** - ADA guidance form will be created and if approved by Leave Case Manager ADA policy will be added to the case and should be processed further using the ADA policy
 - ii. Leave as an accommodation is not applicable - the leave will be denied
 - iii. **Leave is a reasonable accommodation** - ADA policy will be added to the case and should be processed further using the ADA policy
 - d. **Select** the choice that is most appropriate and click **Next** to continue, and **Submit** to complete the wizard
2. From the Accommodations Module
 - a. Accommodation created as the result of a Return to Work process
 - b. Accommodation case without an existing leave case



Lesson 2 – Advanced Leave Management

The advanced leave management section will introduce Leave Case Managers (LCMs) to additional leave management techniques that will allow them to get the most out of the Presagia system.

Exercise 5: Create a Leave Extension and a Recurrence

1. Leave Extension
 - a. Locate the Employee's existing **Leave Case**
 - i. Using the Cases search you can locate an open leave case by Case Number (ex. Leave-101) or by using the employee's First or Last name (not both)
 - ii. Click on the Case to load the **Leave Case** side bar
 - b. Modify/extend their **Absence Schedule**
 - i. In the Select Action menu select Modify Absence Schedule
 - ii. The wizard will pop-up, to extend a leave click **Add Row** and enter the day, or days, requested by the employee
 - iii. The *Last date of expected absence* should match your last date of absence within the Absence Schedule
 - iv. Complete the wizard by clicking **Next** and then **Submit**
 - c. In the case-specific worklist, you will see a ***Print and send: Change of scheduled absence*** worklist item, click **Launch** to send the correspondence to the employee
 - d. Recertification
 - i. After sending the letter to the employee, wait for the employee to complete and return the form(s) or necessary documentation
 - ii. Once the documentation has been received, add it to the Documentation record and run the **Review** worklist items to record whether or not the documentation is adequate for extending the leave
 - iii. If you have **Approved** the leave extension, a few changes will take place within the leave case:
 1. The *Return to Work* date is updated
 2. The Last expected absence date is updated
 3. The *Return to Work* related worklist items have been rescheduled to reflect the new anticipated return to work date
2. Leave Recurrence
 - a. Presagia will help users to Identify if the case is a recurrence of a previous, if a newly created leave case matches a similar **Leave Reason** and **Relationship** the system will display the **Reoccurrence check** page
 - b. LCMs will verify if the case is in fact a recurrence or not:
 - i. If a leave is a **recurrence**, then the system will close the newest leave case and append the case data to the existing leave case
 - ii. If the leave is **not a recurrence**, the system will continue processing the leave within the new case
 - iii. If the **LCM cannot make a determination**, the system will continue using the new case but will create WLIs to prompt the LCM to make a determination.



Exercise 6: Reassign a Case

1. From the Leave Case
 - a. Locate and open the **Leave Case**
 - b. Click the **Select Action...** menu
 - c. Select Reassign the Case
 - d. Choose the **new case manager** from the pull-down menu
 - e. Continue to click **Next** through the wizard until you can **Submit** the changes
2. During the Confirm Eligibility and Entitlement wizard
 - a. While running the **Confirm Eligibility and Entitlement** wizard, users will be asked to confirm the case owner
 - b. If an LCM would like to reassign the case, they can **select another LCM from the menu** and continue through the wizard
3. Reassign Case Owner Script
 - a. Click on **Reports** in the navigation header
 - b. Select **Cases** from the reports type field
 - c. Complete the **desired columns**, set your custom **filters**, and select **Reassign Case Owner** from the **Scripts** pull-down menu
 - d. Click **View Report**, and you will be presented with a selectable list of cases
 - e. Click the **checkboxes** next to the cases you want to reassign
 - f. Select the desired (new) case owner from the pull-down menu and click **Reassign**
 - g. The cases will now be reassigned

Exercise 7: Override a Leave Decision

1. Locate the **Leave Case**
 - a. While completing the Confirm and Eligibility wizard
 - i. When the **policy grid** (listing of applicable policies) is displayed an automated status will be filled in
 - ii. This status can be overridden by a user; this means that the status can be set as the LCM desires
 - iii. If changed the LCM will be asked to enter the reason for their decision
 - b. While completing the Review Certification worklist item
 - i. Users can **override the suggested outcome** status at the end of the wizard if they have additional information
 - ii. This status can be overridden by a user; this means that the status can be set as the LCM desires
 - iii. If changed the LCM will be asked to enter the reason for their decision

Exercise 8: Cancel or modify a leave

1. Closing a Case: Natural Closure
 - a. There are no steps to perform in advance, but ensure that:
 - b. There is an open and approved (not pending) leave case that has not been modified in 15-30 days
 - c. That this case has no pending, or incomplete, worklist items



2. Close this Case WLI:
 - a. The Close this Case worklist item should appear naturally; it can be found in the case worklist or the global worklist

3. **Cancelling a Case** (Removing all traces)
 - a. Locate the **Employee**
 - b. Locate the **Case**
 - c. Click the Action Menu, and select Cancel or Modify Case
 - d. Select the option **Cancel Case** on the Modify/Cancel case screen
 - e. On the **Cancel Case** screen, enter a **Reason** for cancelling the case as well as select **Correct Designations and Absences** from the pull-down menu. For cases with existing designation users will need to enter their passwords to continue.
 - f. Launch the **Print and Send: Case cancellation notification** WLI to inform the Employee that their case has been cancelled
 - g. The cancelled absences may be viewed from the employee's **Absence summary** page

4. **Restarting a Case**
 - a. Locate the **Employee**
 - b. Locate the **Case**
 - c. Click the Action Menu, and select Cancel or Modify Case
 - d. Select the option **Restart Case** on the Modify/Cancel case screen
 - e. On the **Restart Case** screen, users will be warned that this process is not reversible, then they will restart the Request a Leave (RAL) wizard
 - f. Users may then request a new leave for the same period, and once the new leave is approved and has a matching absence schedule, all absences will be associated and designated to the new case

Leave Process Overview



We breakdown the Leave workflow into phases:

- Leave Intake
- Evaluation
- Monitoring
- Return from leave
- Accommodation (RTW/SAW)

These phases are designed to simplify, and reduce the amount of work necessary for a case manager to evaluate an EE's request for leave.

Leave Intake Phase

The 'Request a leave' wizard is Presagia's tool to capture necessary information to determine if leave is warranted, and which policies may be applicable. By prompting the user (case manager, or supervisor/HR manager of the EE, or even EE self-service) to answer the questions in this wizard, the necessary information for evaluating a leave request is gathered into one central location, in preparation of the next phase.

- Designed to evoke sufficient information to determine the nature of the need for leave.

- Allows evaluation of all applicable leaves.

Evaluation Phase

The evaluation phase begins with launching the 'Confirm eligibility and entitlement' wizard. In this phase, the system automatically matches the leave reason (gathered in the Intake phase), to a list of leave policies that are stored in the system to determine appropriate policy coverage. The system will evaluate:

- Applicability: determined by evaluating the leave reason, relationship, employment location, employee gender.
- Eligibility: determined by evaluating characteristics of employee, length of service, hours worked, etc.
- Entitlement: determined by counting prior designations and subtracting them from the policy entitlement in the given timeframe.

These calculations are automatically performed using prior absence designation information, attendance information provided in the data imports, and leave request information gathered in the Intake phase, thus reducing a case manager's work significantly. The Presagia compliance engine uses these calculations and parameters to provide a recommendation to the LCM.

- The compliance engine matches the provided leave reason to the list of available policies and shows all that apply.

One of Presagia Enterprise's tenets regarding leave is "One leave reason, one leave case".
Supporting Documentation

- System manages request, review, and storage of supporting documents.
- Provides workflow for each of these functions.
- Automatically sets required alerts and reminders

Monitoring

The monitoring of a leave case with Presagia Enterprise is highly automated.

Presagia Enterprise uses the regularly imported demographic, attendance and absence information to calculate designations for each absence, so that the case managers will not have to.

During this phase, the system will alert the leave case manager of exhaustion events, entitlement update notifications, automatic leave extensions, etc.

These alerts or prompts appear on the LCM Worklist in a To Do status

- Highly automated.
- Monitors absence imports.

- Keeps track of exhaustion events.
- Provides alerts and tasks for LCM when events occur that require action.
- Provides "To do" items on the case management worklists when tasks are due.

The case manager has additional tools that may be used without prompting, should they require - for example, manually initiating a recertification process for an existing approved period. By automating the more time consuming calculations for the case manager, the system frees up much of the case manager's time, allowing the case manager to do pro-active checks and concentrate their attention on the more complex cases.

Return from Leave

Return from leave is the phase where the employee will soon no longer need leave from work. The employee may return at a reduced schedule, or may require accommodations. Since the workflow is work-list driven, the system will prompt the case manager to start this process, and generate correspondences to be sent to the employee, asking him to confirm the dates in advance of the employee's expected return.

A wizard is generated, which prompts the user to input information that will determine if the employee needs a leave extension, or any accommodations. Accommodations entered in this phase are passed directly into the next phase of the workflow.

- Automated status inquiry letter.
- Wizard allows for confirming return from leave.
- Workflow to address need for accommodation.
- Option for transitioning to a new leave.
- Option to capture restrictions.

Accommodation (RTW/SAW)

The Accommodation module is designed for use when the employee is coming back to work, but needs adjustment to his job, or a temporary transitional job, before returning to full duty. Presagia Leave aids the case manager in monitoring an employee's return to work by allowing the case manager to enter into an interactive process with the employee to evaluate the employee's capabilities and possible duties. During his reintegration into the workforce the employee's current abilities may be repeatedly compared to that of his original job, or the transitional assignment in assessing ongoing accommodation needs. During the accommodation, it may be deemed necessary for the employee to take leave as his accommodation, which would require the case manager to redo a leave intake.



We breakdown the Accommodation workflow into phases:

- Accommodation Request
- Information Gathering
- Impact Analysis
- Evaluate and Propose Accommodation
- Accommodation Decision
- Program Monitoring
- Program Exit

Accommodation Intake

There are two entry points into the Accommodation module:

- Direct: need to address a request for accommodation (Stay at work or SAW).
- Integrated: Employee returning from leave with restrictions (Return to Work or RTW).

The system or user will create an Accommodation case which provides structured guidance and information capture for the interactive process. This case will be used to track any restrictions/accommodations required by the employee.

Within the case the user will have access to Incident and Diagnosis records to capture information supporting the requested accommodation.

An accommodation case is entered in the system via the **Request for Accommodation** wizard. It provides ability to capture detailed information on the need for accommodation and allows to upload of supporting documentation.

The wizard elicits the information via a series of questions. Depending on the options selected in a wizard page, the wizard will ask more questions related to that specific path.

Information Gathering

In the information gathering phase leave case manager has to

- Solicit, capture, and record employee's restriction
- Review and confirm Essential Functions
- Engage employee in interactive process

Accommodation Evaluation

Once all necessary information have been gathered, employee's job description has to be reviewed, restrictions have to be added to the case and **Review job description and restrictions** wizard has to be completed, next wizard to complete is **Restriction Analysis** wizard, it provides a visual comparison of essential functions and restrictions.

Exploring Accommodation Opportunities

Once Restriction Analysis has been completed, case manager has to explore accommodation opportunities, he can pick *Leave as an Accommodation*, *Alternative job search* or *Modified duty*.

Accommodation Decision

Case manager has to select the alternative job as an accommodation or modify current duties. After that case manager sends Proposed accommodation correspondence to the employee. When employee's respond has been received case manager has to review Proposed accommodation.

Program Monitoring

Once the accommodation has been accepted by the employee, the system will automatically set an Evaluate accommodation worklist item reminder. Case manager launch **Evaluate Accommodation** wizard to review the request for accommodation and begin the interactive process.



Lexicon of Leave Handout:

Words that matter

Policies

- How we translate legislation and company policies into rules that the system can use to evaluate eligibility and track entitlement usage.

Cases

- 1 leave reason for 1 case.
 - Interaction between pregnancy disability and bonding leave results in 2 different cases.
- Contain all information relevant to the leave management process.
- Have a built in “Worklist” that identifies all the required actions yet to be completed for the case to be managed in a compliant manner.
- Have an “Action Log” that defines all the tasks that have been completed for the case.

Leave

- Permission to be away from work when expected to be working.
- Leaves can be requested, approved or denied.
- Leaves are generally expected to be requested in advance.

Absence

- A historic event resulting from an employee being absent from a scheduled shift.
- An absence with no corresponding approved leave is considered unexcused and/or undesignated.

Absence Schedule

- Dates the employee is expected to be out on leave.
- Used to inform the system to expect an absence for a specific case.
 - When the employee has multiple intermittent concurrent cases, the absence schedule tells the system which case to assign the absence to.

Designation

- The process of assigning an absence to an approved leave policy with remaining entitlement.

Applicability

- Evaluation of the leave reason, relationship, employment location, employee gender.

Eligibility

- Evaluation of characteristics of employee, length of service, hours worked, etc.

Entitlement

- The duration of time away from work granted to an employee under a policy.
- Tracked in the units specified by the policy.
- Always measured by calculating amount taken in a period and subtracting from maximum allowable (dynamic).



Worklists

- Contain tasks and system events in varying states of completion.
- Each case will generate and track its own tasks.
- All tasks are listed on the global worklist.

Workflow

- Automated guidance and decision support.
- Action based.
- Identifies next steps and notice requirements.

Continuous vs Intermittent

- In the Presagia system a continuous case consists of a single continuous period of absence.
- All other scenarios are considered intermittent:
 - Reduced Schedule leaves – i.e. when the employee only works 4 hours a day.
 - Continuous period followed by intermittent leave – i.e. when an employee is out for a continuous period for surgery followed by an intermittent period of appointments and/or rehab.
 - Regular intermittent – i.e. Chemotherapy appointments every Tuesday.
 - Unpredictable intermittent – i.e. the employee suffers from asthma or migraines.

Pregnancy disability and Bonding leave (a.k.a Maternity Leave)

- Presagia treats maternity leave as two distinct phases:
 - Pregnancy disability leave– when the employee is unable to perform the functions of her job due to the pregnancy, either prior to the birth or as recovery following.
 - Bonding leave – when the employee takes time off after the birth to bond with their child, but there is no medical reason preventing them from performing the functions of her job.
- The Presagia system expects the LCM to create two cases (one case, one leave reason) to cover these two different scenarios.

Employment Profile

- Contains all work related information about an employee, work location, hire/rehire dates, etc.
- Only one primary active profile (can have other secondary profiles).
- Contains the employee's job description.

Accommodation

- A request for a modification or accommodation so that all essential functions of a job can be completed.
- Generally comprised of any modification to an employee's usual and customary job or work environment required to allow the employee to return to, or remain productive in, the workplace.
- Commonly refers to activity driven by, or in consideration of, the requirements under the ADAAA.
- In the Presagia system it refers to any and all of the tools used to undertake and/or monitor the interactive process.





Restriction

- A request to be excused from performing one or more of the essential functions of a job.