Managing the Medical Leave Process
Presenter

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Leave Administration Manager
What Will Be Discussed

Steps that Should be Taken for Managing the Medical Leave Process

- Step 1- Counsel and Communicate with the Employee
- Step 2- Provide Employee with Application Forms
- Step 3- Submit Forms to Benefit Services
- Step 4- Process the Forms
- Step 5- Monitor the Employee’s Leave
- Step 6- Ensure Employee is set up to return
Employee needs be out for a serious health condition

**Employee’s Responsibility:**

- Responsible for requesting to be out on a medical leave
- Completing the forms timely
- Keeping all parties informed when necessary
  - Management
  - Department HR
  - Leave Unit
Step 1- Counsel and Communicate with the Employee

Department HR Responsibility:
If serious health condition is foreseen:

- Review leave policies applicable to employee’s situation with employee and/or supervisor
  - All leaves run concurrently if more than one leave is applicable
    - Family & Medical Leave
    - Family Illness Leave
    - Voluntary Shared Leave

Faculty Employees
- Faculty Serious Illness and Major Disability Leave
- Faculty Parental Leave

Refer to this website for information on the policies: http://hr.unc.edu/policies-procedures-systems/
Step 1- Counsel and Communicate with the Employee

Department HR Responsibility:

- Facilitate the process between management, leave unit and employee
  - Direct employee to supervisor
  - Stress the importance of communication and their responsibility

- Discuss schedule
  - Intermittent, continuous or reduced work schedule

- Discuss exhaustion of leave
  - Who is going to exhaust leave in TIM?
  - How to code leave in TIM?

  Pay Codes for TIM
  FMLA PD- Sick
  FMLA PD -Vacation
  FMLA PD- Bonus
  FMLA PD -Shared Leave
  Family Illness LWOP
  Faculty- Parental Leave
  FMLA- LWOP
  Faculty Disability
Step 1- Counsel and Communicate with the Employee

Department HR Responsibility:
If employee goes out of work and the condition is not foreseen:
- Communicate the employee each day to see if employee needs to apply for a medical leave
- After the 10th day and employee is still out for medical condition, leave request forms should be given
- Leave can be applied retroactive
- **DO NOT DISCUSS THE EMPLOYEE’S MEDICAL CONDITION**

Supervisor’s Responsibility:
Note: Supervisor may need Department HR’s guidance

- Discuss Schedule with the employee
  - Continuous, Intermittent or Reduced Work Schedule? Start and End dates of leave?
  - If Intermittent or Reduced Work Schedule:
    - Work together on a schedule to accommodate both employee and dept.
    - Responsibility of job duties- set the expectation up front
    - **DO NOT DISCUSS THE EMPLOYEE’S MEDICAL CONDITION**
Step 1- Counsel and Communicate with the Employee

Leave Administration Unit’s Responsibility:

- Counsel and provide guidance to all parties on leave policies, procedures, and responsibilities, when needed
  - Department HR
  - Management
  - Employee

- Review leave policies applicable to employee’s situation, when necessary

- Communicate leave balances, when needed
  - FMLA
  - VSL, etc.
Step 2 - Provide Employee with the Application Forms

Department HR & Supervisor’s Responsibility:
*Note: We do not need originals or multiple copies*

- UNC Chapel Hill “Medical & Parental Leave Request Form”
  - **Note:** Ensure the form is complete with EE’s information, dates and signatures

- U.S. Department of Labor Certification for Health Care Provider for Employee’s Serious Health Condition (WH-380-E) or Family Member’s Serious Health Condition (WH-380-F)
  - **Note:** According to HIPAA, the EE is not required to share with their department. This form should be sent directly from the Doctor and/or EE

Refer to this website for forms:
[http://hr.unc.edu/form-finder/leave-forms/](http://hr.unc.edu/form-finder/leave-forms/)
Step 3 - Submit the Forms to Benefit Services

Department HR/ Supervisor’s Responsibility:
- Submit Medical & Parental Leave Request Form

Employee’s Responsibility:
- Submit U.S. Department of Labor Certification for Health Care Provider for Employee’s Serious Health Condition or Family Member’s Serious Health Condition (Doctor can submit directly to Benefit Services)

- U.S. Mail
  - 104 Airport Drive
    Chapel Hill, NC 27599

- Campus Mail
  - CB#1045

- Fax
  - 919-962-6010

- Email (Please do not email Benefit Consultants directly)
  - leave@unc.edu

Be careful when sending medical information, send secure or via fax or mail
Step 4- Process the Forms

Leave Administration Unit’s Responsibility:

- Forms are reviewed for completeness and adherence to policy, notification sent to Department’s HR, Supervisor and EE via email
  - Notification only sent to Department HR for Voluntary Shared Leave Donations

- Employee must be notified of eligibility within five business days of receipt of forms, absent extenuating circumstances
Employee Goes Out on Leave
Step 5- Monitor the Employee’s Leave

**Communication is important!**

Department HR’s Responsibility:

- Place EE on a Leave of Absence action, if continuous
  - **Note:** An employee should not be placed on a LOA if intermittent or reduced work schedule

- Monitor the day-to-day leave tracking for employee via TIM or Spreadsheet
  - Ensure employee does not exceed entitled leave balance

- Send letter to the employee for official documentation
  - Expected return date & consequences for not coming to work without notification- contact Employee and Management Relations for assistance

- Find out if the employee needs to be out longer
  - Other leave options, short-term disability option
Step 5 - Monitor the Employee’s Leave

Department HR’s Responsibility:
- Ask employee to complete University’s Return to Work Form if employee is out for their own serious health condition
  - Do not allow employee to come back without that form

Supervisor’s Responsibility:
- Assist in tracking employee’s leave
- Alert Department HR if something changes
  - Very important if leave is intermittent or a reduced work schedule
Employee Returns From Leave
Step 6- Ensure employee is set up to return

**Department HR’s Responsibility:**

- Ensure that Return to Work is received from employee and doctor and sent to the Leave Administration Unit

- Reinstate employee if placed on a leave of absence action

- Communicate with employee on the amount of leave used during absence via email
If an EE is going on leave for birth, adoption or foster care

FMLA is required

- Medical & Parental Leave Request Form only required if the medical disability is expected to exceed a typical birth (normally 6 wks)
- Medical Certification is only required when employee’s disability period has been extended - i.e., C-Section, bedrest, etc.

Voluntary Shared Leave

- Employee can only receive and use leave during the disability period only, not for bonding with the baby

Resources Available

- “A Baby! What Do I Do Class!” - facilitated by the Leave Unit
- Stork Reward Program - administered by the State Health Plan
- Free Breast Pump - provided by the State Health Plan if enrolled in Enhanced 80/20 Plan or CDHP
Summary

Keep the Lines of Communication Open!

3-way Partnership between the department, employee and leave unit:

Employee:
- Responsible for requesting FMLA, completing the forms timely, and keeping all parties informed
- Communicating with management, department HR, and leave unit the leave status and RTW

Department:
- Responsible for facilitating the info between management, leave unit, and employee
- Submitting the completed forms to Leave Unit (except for Medical Certification)
- Processing any required HR actions
- Tracking the time off in TIM
Summary

Keep the Lines of Communication Open!

3-way Partnership between the department, employee and leave unit:

Department:
- Working out schedule and expectations for intermittent or reduced work schedule
- Communicating the return to work

Leave Unit:
- Counseling all parties on leave policies, procedures, and responsibilities
- Approving leave timely and providing required notifications
- Communicating leave balances, etc.
- Informing department of intermittent or reduced work requirement
Who Can I Call for Help?

Please contact the Leave Administration Unit or the Benefits Consultant assigned to your department

Leave Administration Unit
Leave Administration Manager
919-962-4289

- Jeannie Alston
  919-962-6910
  jeannie_alston@unc.edu

- Shanel Haskins
  919-843-0500
  Shanel_haskins@unc.edu