

Reliance Standard Life Insurance & Matrix Absence Management - Supervisor & Manager Training Presentation for:

**Jackson**  
HEALTH SYSTEM  
*Miracles made daily.* May 2018

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**Reliance Standard / Matrix Absence Management Team**

**Kathryn Schmoling**  
National Client Manager | TN  
Reliance Standard

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**Agenda**

- Introduction and Objectives
- Reliance Standard / Matrix Absence Management
- An Introduction to our Organization | Matrix Expertise
- Step 1: Claims Intake Process
- Step 2: Claims Management
- FMLA 101
- Step 3: Focus on Return to Work
- Benefit Payments and Management
- eServices and eAccounts
- Roles & Responsibilities
- Appendices

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**MATRIX EXPERTISE**

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### Best Practice Absence Management Model

- 1 Web Based/Telephonic/Mobile Claims Intake  
24/7/365
- 2 Status Notification Day 1    Medical Outreach 3x10 Days    Intake Packet Email/USPS/Mobile App
- 3 Account Dedicated Team
- 4 Integrated Systems Platform
 


FMLA/STD	LTD	ADA	Work Comp
Clinical Case Management			
- 5 Data Warehouse
- 6 Reporting Tool



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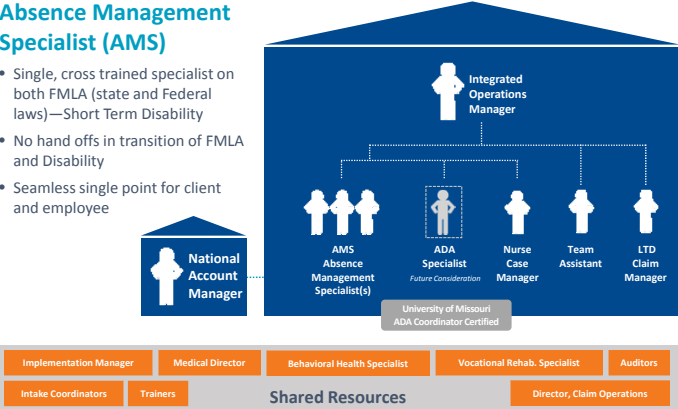



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### Our Absence Management Integrated Staffing Model


#### Absence Management Specialist (AMS)

- Single, cross trained specialist on both FMLA (state and Federal laws)—Short Term Disability
- No hand offs in transition of FMLA and Disability
- Seamless single point for client and employee






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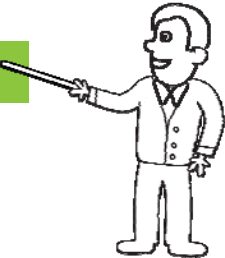



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### Step 1: Claims Intake Process






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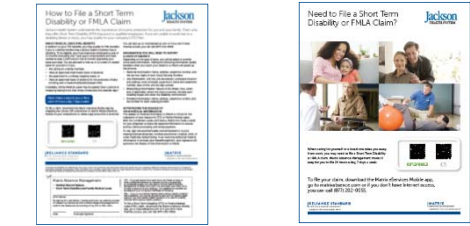


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### Communication Materials


**One Pager:**  
Details on how to file a claim Mobile, Web-based or telephonically

**Includes:**  
authorization release card




**Posters:**  
Details on how to file a claim Mobile, Web-based or telephonically


**Three Pager:**  
Details on how to file a claim Mobile, Web-based or telephonically With an overview of the claims process




**Includes:**  
authorization release card



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### Consumer Driven Claim Reporting – 24/7/365

**Employee, Family Member or HR Reports Absence**

Fully Integrated intake for employees with FMLA/STD

- Focused on Customer Experience
- Extension of HR
- Addresses all preferences

### Reporting the Initial Claim

**Claims filed through Matrix Absence Management telephonic intake, mobile app, or secure website:**

- Internet [www.matrixabsence.com](http://www.matrixabsence.com) Employee will set up eServices ID to file online and view their claim detail on-line
- Matrix Mobile Application
- Telephonic intake center (877) 202-0055
- Employees of Jackson Health System need to continue to follow corporate reporting policy

**Employee needs to provide us the following:**

- Name, last four digits of Social Security number, address & phone number
- Physician's contact and fax information
- Description of illness or injury
- Job title and a brief description of job

### 24/7/365

Call Volume	Stats
# of Calls Handled	946,804
Average Talk Time	11:52
Abandon Rate	.44%
# of Intakes Filed	290,335
	- 273,696 telephonic
	- 18,839 (self-service (online/mobile app))
# of Surveys Offered	320,880
# of Surveys Completed	11,94%
% of Positive Surveys	98.85%


**Telephonic National Customer Contact Center**

No outsourcing – U.S. based staff 24/7/365	90% of calls answered in less than 30 seconds.
Caller Authentication Process	
Automated Pre-Qualification of Eligibility	Customized script designed around client culture!
All calls recorded and maintained for one year.	

<b>Core Hours 8AM - 5PM</b>	<b>72.92%</b>
<b>Off Hours &amp; Weekends</b>	<b>27.18%</b>

### Step 2: Claims Management

### What happens when a claim occurs?



**Claim Intake**

- 1 Notify Employer
- 2 Contact Physician
- 3 Send Packet to Employee


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### Notify Employer (Manager/Supervisor)

1 Notify Employer



Status Notifications are sent to Supervisors and Directors passing on the HR Data Feed File.

Includes Status Notifications for continuous and partial absences.

Is customized to provide additional direction to recipients for New Claims, Status and Return to Work.

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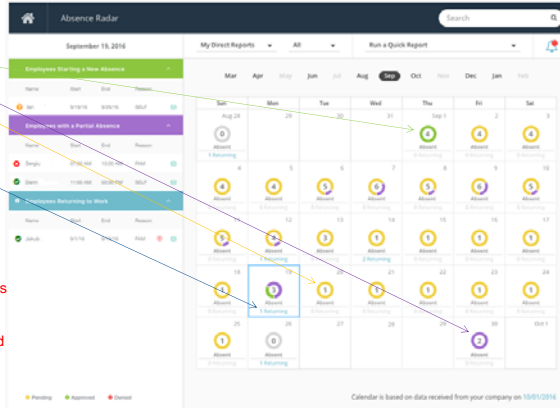
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### HR Daily Notifications | Your Calendar View

1 Notify Employer

**Calendar Shows:**

- New Claims
- Partial Absences
- Continuous Leaves
- Employees Returning to Work



CLIENT NAME has posted additional videos to be viewed on HR Status Notifications and Absence Calendar [Link to ER Intranet](#)

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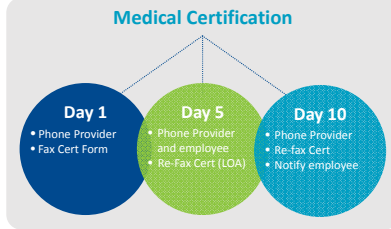
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### Medical Provider Contact

2 Contact Physician

•Robust Medical Unit staffed with licensed nurses



**Success Rate**

- Day 1: 35%
- Day 5: 68%
- Day 10: 92%

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### Intake Packet - Customizable and Integrated

3 Send Packet to Employee

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ADDRESS: 10000 W. 10TH AVE., SUITE 1000, DENVER, CO 80202

PHONE: (303) 755-1000

WEBSITE: [www.matrixabsencemanagement.com](http://www.matrixabsencemanagement.com)

EMAIL: [matrix@matrixabsencemanagement.com](mailto:matrix@matrixabsencemanagement.com)

FROM: CLARIBET JAMES, Director of Operations

TO: [Employee Name]

RE: [Employee Name]

Dear [Employee Name],

We are pleased to have you as a member of the Matrix Absence Management team. We are committed to providing you with the highest quality of service and support. We will be working with you to ensure that your absence is managed as smoothly as possible. We will be providing you with a packet of information that will help you understand the process and what you need to do to get back to work as quickly as possible.

Please take a few minutes to review the information in this packet. If you have any questions, please contact your manager or the Matrix Absence Management team. We are here to help you every step of the way.

Thank you for your cooperation and understanding. We look forward to working with you again.

Sincerely,  
Claribet James  
Director of Operations

**WHAT YOU NEED TO DO NOW**

1. Read and sign the required certification form. Please print your name and date on the form. You may fax this to the following number:

2. Submit your report to your doctor as soon as possible.

3. Submit your report to your manager as soon as possible.

4. Complete your report and send it to the Matrix Absence Management team.

5. Complete the required certification form and send it to the Matrix Absence Management team.

6. Complete the required certification form and send it to the Matrix Absence Management team.

7. Complete the required certification form and send it to the Matrix Absence Management team.

8. Complete the required certification form and send it to the Matrix Absence Management team.

9. Complete the required certification form and send it to the Matrix Absence Management team.

10. Complete the required certification form and send it to the Matrix Absence Management team.

**DISABILITY** **FMLA**

There are many ways to communicate with us. You can call us at 1-800-368-7262, visit our website at [www.matrixabsencemanagement.com](http://www.matrixabsencemanagement.com), or email us at [matrix@matrixabsencemanagement.com](mailto:matrix@matrixabsencemanagement.com).

**FREQUENTLY ASKED QUESTIONS**

**What do I need to know to get started?**

1. You must be an active employee of the company.

2. You must be on a leave of absence.

3. You must be on a leave of absence for a minimum of 30 days.

4. You must be on a leave of absence for a maximum of 180 days.

5. You must be on a leave of absence for a minimum of 30 days and a maximum of 180 days.

6. You must be on a leave of absence for a minimum of 30 days and a maximum of 180 days.

7. You must be on a leave of absence for a minimum of 30 days and a maximum of 180 days.

8. You must be on a leave of absence for a minimum of 30 days and a maximum of 180 days.

9. You must be on a leave of absence for a minimum of 30 days and a maximum of 180 days.

10. You must be on a leave of absence for a minimum of 30 days and a maximum of 180 days.

Single integrated packet. Viewed on web or mobile. 2017 - 54% Electronically

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### AMS Examiners – Proactive employee contact within 24 hours

#### Initial Claim Interview Process

- Explains role
- Discusses claim process
- Single point of contact
- Explains claim process
- Ensures employees understand their role
- Answers questions/concerns
- Trained on client culture, absence and disability plans
- Expert in regulations



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### Personalizing Claim Experience for the Employee

#### Multiple Ways to Communicate

Text



Online



Auto connect

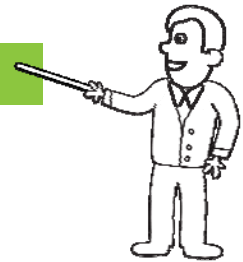


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### FMLA 101: Crash course



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### FMLA: Integrated, Rules-Based Technology

Streamlines eligibility    Counts time by type    Uses work schedules    Manages complex scenarios    Rules-based accuracy and ease

**Leading Technology**

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### FMLA 101: Leave Administration for Serious Health Conditions

#### What is the Definition of a Serious Health Condition?

- Inpatient care plus ensuing incapacity and treatment
- More than 3 days incapacity plus treatment  
Colds, flu, common headaches, and other common ailments can become Serious Health Conditions
- Pregnancy-prenatal care
- Chronic conditions such as Migraine Headaches, Diabetes, Lupus, Crohn's Disease
- Permanent & long-term conditions
- Multiple treatments such as Chemotherapy, Dialysis, and Physical Therapy

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### FMLA 101: Intermittent FMLA Details

#### What is an FMLA Intermittent Leave?

Job protected time away from work calculated in a:

- Reduced number of days in a work week
- Reduced number of hours in a day

Must be medically certified by treating physician, with frequency and duration clearly outlined.

Requirements to qualify:

- Must meet a serious health condition definition
- Can be a single injury/illness day
  - doctor appointment, prenatal exam
  - physical therapy, chemotherapy

#### Facts about intermittent Leave:

- Leaves are certified for up to 6 months
- Leaves are reviewed every 60 days for patterns of absence
- If no time reported employee is contacted
- Re-certification can occur at the 60 day or 6 month mark if needed

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### FMLA 101: Intermittent FMLA Details

#### How is FMLA Intermittent Leave used?

- For hours in a day, must be measured in same increment of time as other leaves but no longer than 1 hour
- Must be calculated according to employees scheduled time
- Regularly scheduled required OT missed can be FMLA

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### Intermittent Absences – We Make It Easy

**Reporting Absence**

1. Employee
2. Family Member
3. Employer

**Multiple Reporting Options Available**

**Immediate Absence Management Specialist Notification**

Immediate notification into claim system of time requested.

Medical certification begins right away:

1. Leave Type
2. Own vs. Family
3. Within Certification
4. Any Patterns noted
5. Approval / Denial

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### FMLA 101: Administration and Employee Communications

**Matrix leave letters sent to employee:**

- Eligibility/Notification letter
- 10-day letter if needed
- Approval/Denial letter
- 20-day letter (before certification ends)
- Incomplete certification letter

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### FMLA: Intermittent Risk Management Process

1. Verify qualified medical doctor is certifying leave
2. Verify condition qualifies as a Serious Health Condition
3. Verify certification is complete
4. Frequency and duration checked for each absence and only approved if covered by certification
5. Check patterns of multiple intermittent leaves which may be indicated for one person
6. Routinely analyze file for patterns every 60 days (day of the week analysis)

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### Step 3: A Focus on Return to Work

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### Return to Work – Administrative Process

RTW form must be sent to Employee Health Services office at [JHS-ReturnToWork@jhs-miami.org](mailto:JHS-ReturnToWork@jhs-miami.org). Failure to do so will delay your ability to return to work. RTW forms are included in the employees intake packet.

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### STD to LTD Transition Process

**Automatic Transition Prior to LTD Benefit Effective Date**  
6 weeks when 180 day LTD EP

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### Management of Benefit Payments

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### Employee Benefit Payment Detail

**Benefit payments:**

- All STD Benefits: Approval & Payments made by Matrix on Reliance check stock.
- All LTD Benefits: Approval & Payments made by Matrix on Reliance check stock.

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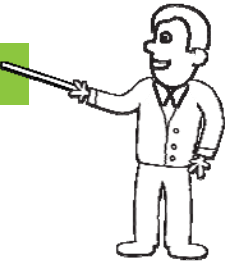
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## Roles and Responsibilities



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## Employee Responsibilities

Request LOA through Human Resources/Benefits and contact Matrix directly (up to 30 days prior to expected LOA start date) to file claim telephonically or online:

- Employee must provide start date & estimated duration of LOA
- Employee does not need to state specific medical condition
- Intermittent FMLA – All scheduled treatment/appointments must be coordinated with supervisor in advance\*  
\*Employee required to follow Jackson Health System call-in procedures for unexpected FMLA absences
- Employee must confirm during Intake if absence is FMLA related

Medical Certification:

- Ensure medical information is supplied by providers



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## Employee Responsibilities

Communication:

- Inform Matrix of return to work status
- Report intermittent FMLA time used on a weekly/bi-weekly basis based on company payroll
- Inform Matrix of work restrictions
- Advise supervisor of absences in accordance with company policy

Return to work status:

- Ensure release to return to work is submitted to the employer 2 days prior to return to work and conform with employer's RTW policies. RTW form must be sent to Employee Health Services office at [JHS-ReturnToWork@jhs-miami.org](mailto:JHS-ReturnToWork@jhs-miami.org). Failure to do so will delay employees ability to return to work. RTW forms are included in the employees intake packet.
- Coordinate with Jackson Health System for any arrears payments due for continuation of benefits



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## Employer Responsibilities

HR Staff / Benefits Team

- Process all necessary LOA status changes
- Managers/Directors - Review Status Notification and Absence Calendar distribution from Matrix
- HR Representatives – Review Status Notification Report
- Monitor employee's claim status throughout leave
- Enter appropriate PTO/Sick time in accordance with Jackson Health System policy while employee is out on leave
- Review and coordinate special accommodations and work restrictions with supervisor. Communicate back to Matrix on accommodations
- Continue to serve as liaison for supervisors and employee on LOA- related matters
- Manage the company return to work process



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## Employer Responsibilities

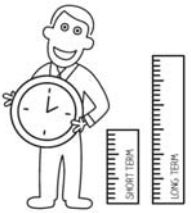
**Supervisors / Managers**

Observing staff for potential FMLA and/or Medical LOA needs:

- Absent more than three (3) consecutive days for the same illness or medical condition
- Employee was hospitalized
- Birth, adoption or placement of child
- Employee informs you that a qualifying family member has a serious health condition

Review company leave procedures with employee and remind employee to file claim with Matrix

Verifying intermittent FMLA/Leave time




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## Appendices



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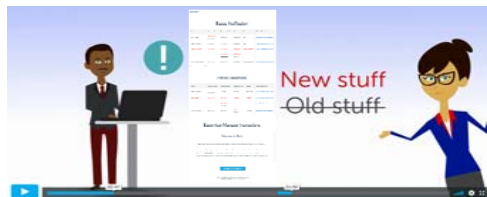
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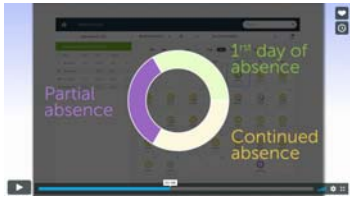
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## Absence Radar Educational Videos


ABSENCE RADAR



Status Notifications Video



Absence Calendar Video



Reports & Filters Video

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