



**PAID FAMILY & MEDICAL LEAVE**  
 AUGUST 16, 2018 | 10:00 AM – NOON  
 ADVISORY COMMITTEE MEETING MINUTES  
 ASSOCIATION OF WASHINGTON BUSINESSES

<b>Attendees</b>	Department Representative: Carla Reyes, Paid Family and Medical Leave Interim Director Paid Family and Medical Leave Act Ombuds: Edsonya Charles Employer’s Interests Representative: Bob Battles Employer’s Interests Representative: Julia Gorton Employer’s Interests Representative: Samantha Grad Employee’s Interests Representative: Marilyn Watkins Employee’s Interests Representative: Maggie Humphreys (on Phone)
<b>Guests</b>	PFML Policy & Rules Manager: Matt Buelow PFML Technology Manager: Lisa Kissler PFML Communications Manager: Clare DeLong
<b>Members Absent</b>	Employer’s Interests Representative: Tammie Hetrick Employer’s Interests Representative: Christine Brewer Employee’s Interests Representative: Joe Kendo
<b>Scribe</b>	Tracy Moore

**Welcome and Introductions: Carla Reyes**

- Introductions at the table. (Note: sign in sheet will capture audience in the room, and conference call technology records the participants dialing in.)
- July meeting minutes reviewed and general feedback provided. Request was made to capture more narrative with the meeting minutes and use a paragraph to summarize the discussion.

**ACTION Carla:** Add more detail to the July minutes and include on the September agenda for approval.

**Status Update: Milestone One – Status Update**

Carla reviewed the adjustments to the technology since last month’s meeting:

- Less automation for the Agency decision around the Voluntary Plan. The system will not be making the decision, an actual person will.
- Story problems were removed to eliminate confusion.
- Information page was added at the beginning of the voluntary plan application process to explain the materials and information needed to complete the subsequent questions, as well as provide overall context for what this portal page is about.
- Added help text throughout the voluntary application pages.
- Provided the ability for employers to upload their Voluntary Plan (or relevant sections).

Impact from the changes are the Technology activities will have a 2-week delay. There will not be a separate soft launch period, rather program staff will engage with employers interested in supported application processing at go-live.



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### Advisory Feedback:

- Clarify that a voluntary plan must meet or exceed state plan benefits in all aspects, including the requirement to cover all employees – add language to page 2 in the Toolkit **(Action Clare DeLong)**
- Would like to view the portal at the September Advisory Committee meeting **(Action Lisa Kissler)**.

Carla advised the language in the Voluntary Plan Guide, as written, aligns with the legislation and policy. If specific changes are needed, ESD would gladly review recommended language suggestions and make changes accordingly.

### Employer Feedback on Voluntary Plans

ESD would like Advisory Committee's help to identify Employers to provide direct feedback (working with ESD Service Delivery Managers) in the first few weeks following the launch (9/17/2018). We'd like to get feedback about their experience with the whole system (technology, phone and email support, communications, etc). Ideal participating employers would entail the following criteria:

- Keen interest in submitting a Voluntary Plan
- Diverse types of companies (e.g. geographic, government / non-government, Business structure (LLC, S Corp), self-insured / privately insured, industry, size)
- Variety of Voluntary Plans (e.g. Medical only, Family only, Both Medical and Family)

**ACTION-- Advisory Committee:** Identify 7-10 employers to participate in the Employer feedback.

### Service Delivery Roadmap

Carla set the context around the service delivery roadmap.

- The Paid Family and Medical Leave Service Delivery Road Map provides information about the plan for release of key services, information and tools that support the program's implementation. The project team is Agile and embraces changes at every point in the process to rapidly respond to changing or emerging rules; customer feedback; and continuous enhancement to previously delivered services. This ability to adapt to change means the plan will evolve based on the most current and best information we have. The Road Map will be updated to reflect changes as they are identified.
- The Road Map reflects a release about every 7 weeks over the course of the project. Releases will occur on this cadence; however, the scope of each release is subject to change as noted above. We don't have to wait until everything is done to deliver something that adds value for the customer.



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- The Road Map will have a corresponding work break down for each release. This will include all the planned activities we believe will be required to accomplish each of the listed objectives for the release. In Agile teams plans start at a high level and go through a process of becoming more and more detailed as you move closer to delivery.

The Bubble chart at the bottom of the slide outlines the sequence and thematic features in each Release. ESD plans to bring concepts to Advisory Committee early to gather feedback. Also, given the fast-paced nature of the project and the monthly Committee meetings only reflect activities for single point in time, Carla intends to provide email updates to the Advisory Committee to highlight key changes or announcements.

Carla, Lisa Kissler and Clare DeLong quickly summarized the activities for each Release.

## **Release 1 – Foundations & Voluntary Plans**

- Entire technology platform and foundational infrastructure is included in this release.

## **Release 2 – Employer Account Management & Appeals**

- Additional account management technology features added.
- Paid advertising / marketing begins.
- Only voluntary plan appeals at this point (employers appealing size will have this capability in April 2019).
- More toolkits released.

Advisory Feedback:

- Employers are concerned about knowing what they need to do on January 1<sup>st</sup>, 2019. Ensure they have time to know what they need need to collect prior to Jan. 1.

## **Release 3 – Employer Representative and Elective coverage**

- Self employed individuals will be able to elect coverage at this point.
- Poster will be printable from paidleave.wa.gov.
- Information provided to employers around reporting (e.g. videos and report templates provided).

Advisory Feedback:

- Providing materials and reporting information sooner will help employers, and their key supports (e.g. accountants).

## **Release 4 – Employer Service Enhancements, CBA Exclusions & Conditional Waivers**

- Placeholder for some technology adjustments.



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- Address the CBA exclusions in the technology.
- Toolkit for Employees will become available.

Key point: ESD will be communicating requirements all along and in advance as much as possible for both employers and employees required actions, even if the technology has not been built yet.

## **Release 5 – Employer Reporting**

**\*\*BIG RELEASE!\*\***

- Employers and TPAs submit information about their employees.
- Update employee and wage information from previous reports.
- Videos with step by step instructions for PFML wage filing.
- Employer size identification.

## **Release 6 – Premium Payments**

- View Premiums owed and make premium payments.
- Online payment processing (already established earlier, but functionality is promoted publicly)

## **Release 7 – Employee Portal Access**

- Employees first opportunity to log into the Portal and view information.
- Benefit determination is built in an earlier release, but the functionality will not be exposed. Plan to use the time in earlier releases to allow for testing and usability feedback.

## **Release 8 – Employee Account Management**

- Employees will have more opportunity to look at their account (e.g. set up payment options, communicate securely with ESD, authorize someone to action on their behalf).

## **Release 9 – Employer Claim Notifications & Medical Certification**

- Employees can view their account balance.
- Functionality to be built; however since benefit claims can't be submitted until January 2020 the functionality will not be accessible in production (for features such as Employer notifications about employees' benefit application, respond to inquiries, and employees complete their medical certification).

## **Release 10 – Ongoing Benefits, Appeals and Audits**

- Functionality to be built and will not be promoted (for features such as completing and monitoring employees' ongoing certification and receiving ongoing payments).



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## Release 11 – Program enhancements

- Placeholder for some technology adjustments and additional features (TBD).

## General Advisory Feedback:

- Provide the target dates on each of the Service Delivery Roadmap slides.

## Communications and Outreach – Clare DeLong

- Brink- marketing consultants introduced – Contract was signed on August 10<sup>th</sup>.
- Employer Readiness Communication Chart shared with key outreach dates (slide 20)
- Three listserv groups (General, small business, Voluntary Plan specific)
- What isn't on the chart is the work that the other state agencies are doing in support of promoting PFML

## Advisory Feedback:

- Anything that goes out on the General listserv should also be repeated on the small business and voluntary plan listserv.
- Concerned about small business outreach where there is less media or no broadband available. Consider using local paper, local radio and grocery stores.

**ACTION Clare:** Forward All Employer emails to Advisory Committee so they can distribute via their listservs, post to their blogs, promote, etc.

Clare explained the Key Messages/Statewide Delivery timeline (slide 21). Team is working on a one-pager regarding the Employer Toolkit. Trying to drive people to the website as there is a lot of information there.

- Paidleave.wa.gov went live today, features include (or are planned):
  - Will transition the focus from the ESD.wa.gov site to the PFML website.
  - Events listing.
  - Premium calculator (employers and employees) will be available next week.
  - Newsroom/blogging functionality by the end of the month.
  - Detailed rulemaking timeline added in September.
  - Stories / testimonials will be added to website.
  - Website will be multilingual as we move forward.
  - Expect to see iterative improvements.



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### Advisory Feedback:

- Would love to hear more about the webinar results (e.g. what are the #'s for participants, topics presented, purpose).
- Market to the smaller businesses (under 50) on the why they should opt in.
- Some basics about PFML are still not understood by employers who have been relatively engaged.
- Target communications and information sharing with accountants and those that do payroll (e.g. third-party administrators, business associations, chambers, SHRM chapters).
- Provide education to employers on how to set up their accounts to remain compliant (e.g. how do I report?, Where do I go? Do I comply? Just "tell us what to do.")
- Check with Labor and Industries language advisory board and learn from their experience.
- Careful with the use of the word "customer."
- Compliments: "Feel heard;" "See the hard work."

### General Program Update – Carla Reyes

- Proposed 2019 Advisory Committee Meeting Dates (All Thursdays)
  - January 17th
  - February 21st
  - March 21st
  - April 18th
  - May 16th
  - June 20th
  - July 18th
  - August 15th
  - September 19th
  - October 17th
  - November 21st
  - December 19th

Initial feedback is to move the January through May meetings to Fridays, for early afternoon and on the capitol campus. Avoid cut-off dates.

**ACTION Carla Reyes:** propose alternate dates for January – May 2019 based on initial feedback.

**ACTION All:** Provide any additional feedback on the dates by September 5, so adjustment to the proposed calendar can be made and decision can be made at the September Advisory Committee meeting.



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- Baseline budget has been built for the program and will be sent in advance of the next meeting to allow for an informed discussion.

General comments:

- Voluntary Guide is posted to the website. [Link to the Voluntary Plan Guide](#).
- MomsRising is launching a new website, in multiple languages and promoting use of video.

### **Suggested agenda items for September meeting (Seattle):**

- Brink Survey
- Budget
- Website
- Detailed review of marketing plan
- Review and approve revised July Meeting Minutes.
- Paid Advertising Plan

(Marilyn will not be able to attend the 9/12 meeting).