# USING EMPLOYEE MESSAGES & MASS E-MAIL UTILITY TO COMMUNICATE PAID SICK LEAVE/FMLA REQUIREMENTS

## TODAY'S WEBINAR

*Some Housekeeping Items:*

- All participants have been placed on mute.
- All registrants will receive a follow up e-mail with a link to the recorded webinar and any training documentation.
- This training is intended for educational and informational purposes. We hope that you will learn a lot today but the information should not be construed as legal advice.
- If you have any questions or want to request training, please e-mail training@ctrhcm.com

Presenter: Kara Stivason, CTR Trainer

# AGENDA

- H.R 6201 Recap
- Emergency Paid Sick Leave Act Flowchart
- FMLA Expansion Flowchart
- Employee Messages
- Mass E-mail Utility

# H.R 6201 RECAP

## H.R 6201 Recap

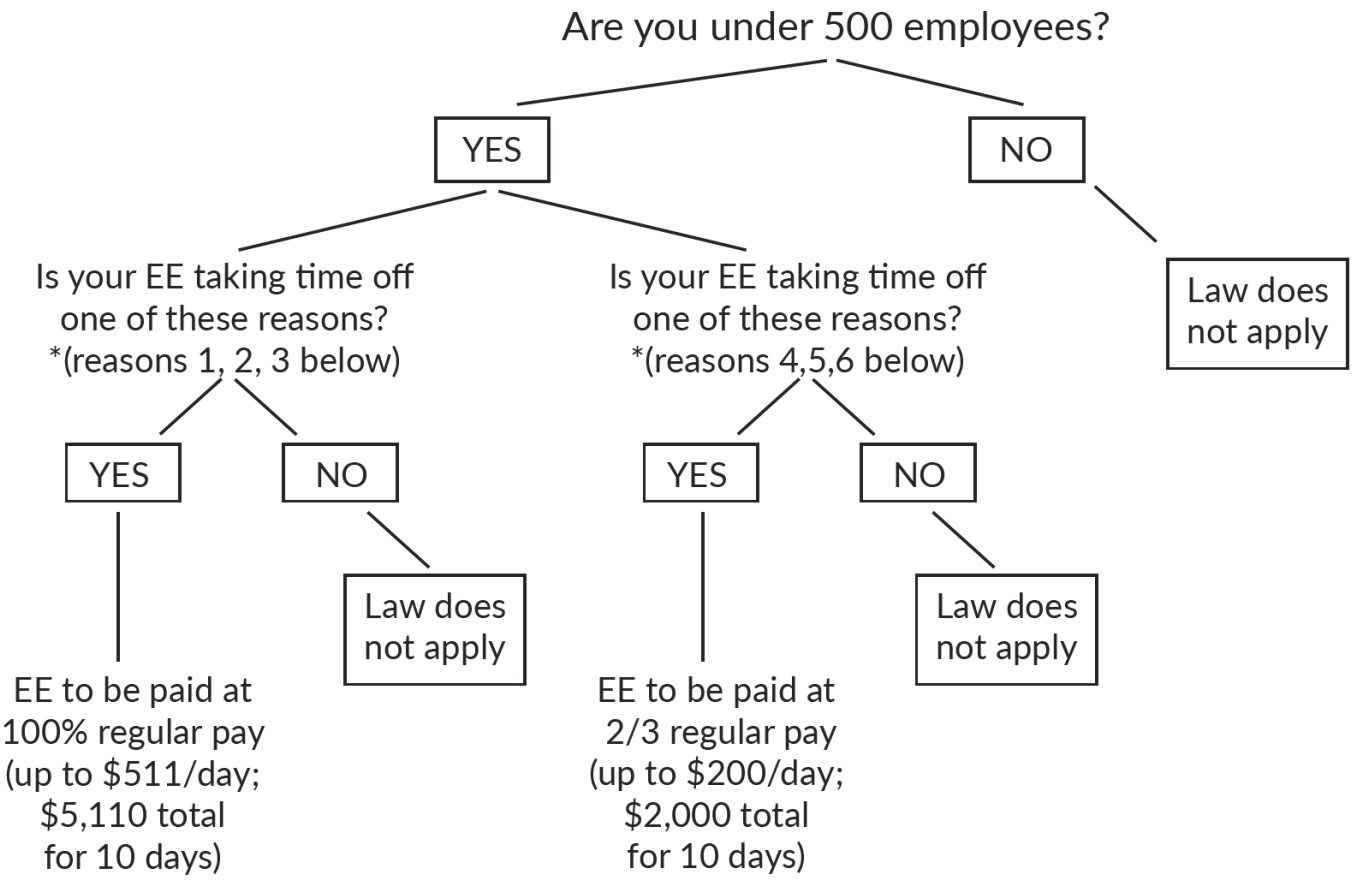
**Emergency paid sick leave: Small businesses will be required to provide two weeks of paid sick leave to an employee that:**

- Has a current diagnosis of COVID–19, or is under quarantine at the instruction of a health care provider, employer, or a local, State, or Federal official.
- Is engaged in caregiving for an individual who has a current diagnosis of COVID–19 or is under quarantine.
- Is engaged in caregiving, because of the COVID–19-related closing of a school or other care facility or care program, for a child or other individual unable to provide self-care.
- This does not apply to businesses with over 500 people and small businesses with under 50 employees may avoid the requirements if they "would jeopardize the viability of the business as a going concern". Treasury has yet to clarify how these exemptions will be made.
- These provisions would expire at the end of calendar year 2020

**Family medical leave: The bill expands the Family and Medical Leave Act to include leave needed to care for an employee's child whose school or care provider is closed due to COVID-19. This leave can be used by employees who have been employed by their current employer for at least 30 days. This applies to any private sector employers under 500 employees.**

- The first 10 days of FMLA leave may be unpaid — beyond that time employers must compensate employees for the remainder of FMLA-leave taken (up to 10 work weeks) at 2/3 of their regular rate of pay.
- FMLA paid leave is capped at $200 per day and $10,000 per employee total.

# EMERGENCY PAID SICK LEAVE ACT

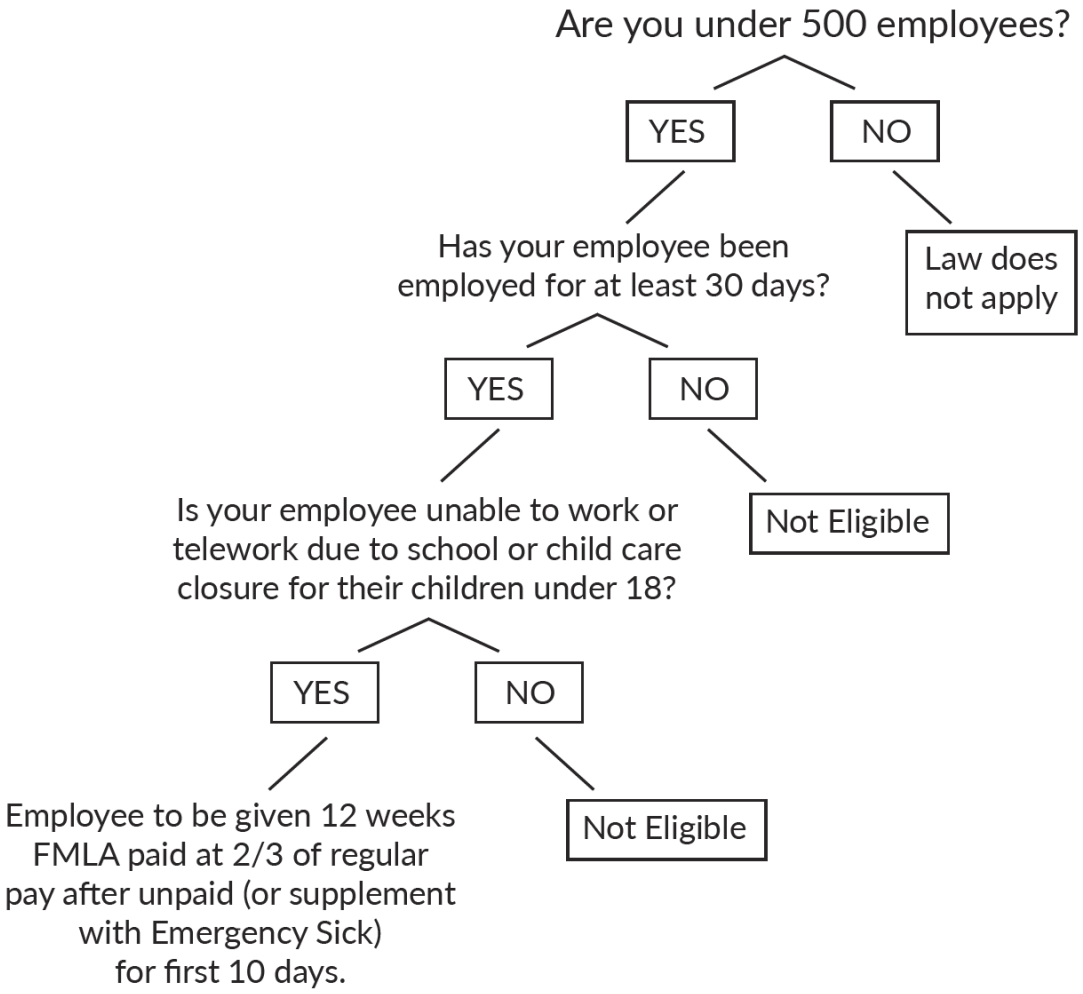


# EMERGENCY PAID SICK LEAVE ACT

In General.—An employer shall provide to each employee employed by the employer paid sick time to the extent that the employee is unable to work (or telework) due to a need for leave because:

(1) The employee is subject to a Federal, State, or local quarantine or isolation order related to COVID–19.
(2) The employee has been advised by a health care provider to self-quarantine due to concerns related to COVID–19.
(3) The employee is experiencing symptoms of COVID–19 and seeking a medical diagnosis.
(4) The employee is caring for an individual who is subject to an order as described in subparagraph (1) or has been advised as described in paragraph (2).
(5) The employee is caring for a son or daughter of such employee if the school or place of care of the son or daughter has been closed, or the childcare provider of such son or daughter is unavailable, due to COVID–19 precautions.
(6) The employee is experiencing any other substantially similar condition specified by the Secretary of Health and Human Services in consultation with the Secretary of the Treasury and the Secretary of Labor.

# EMERGENCY FAMILY & MEDICAL LEAVE EXPANSION



# TRACKING

Based on our attorney's response this does not go into effect until April 1st.  As such, any leave tracked now through April1st would still be under your existing leave policy, under the old FMLA qualifications, or it must be unpaid.

We're here to
help.

## COMMUNICATING WITH YOUR EMPLOYEES

***Communicate, communicate, communicate!***

Now is the time to communicate even more!

To help guide your employees through this, iSolved offers 2 easy ways to electronically communicate with your employees:

→ EMPLOYEE MESSAGES
→ MASS E-MAIL UTILITY

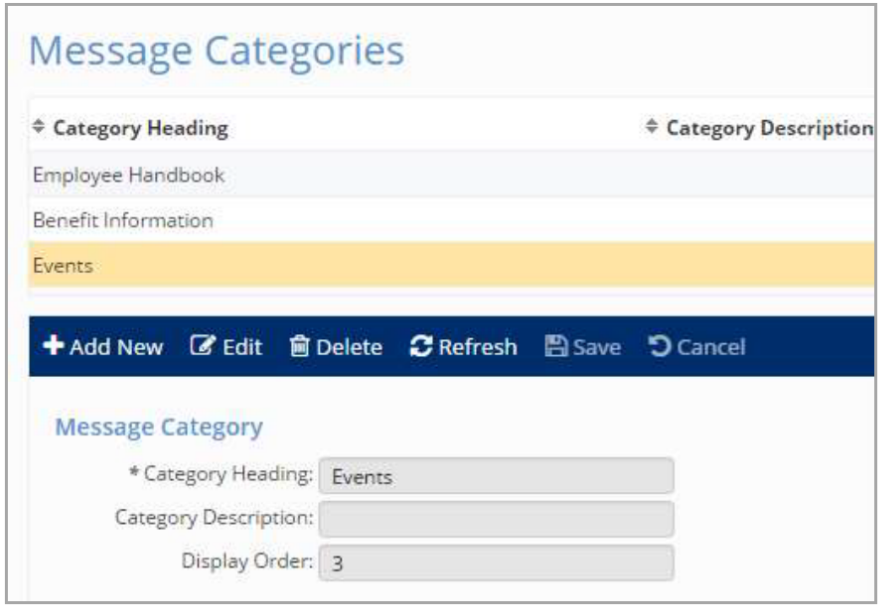
# EMPLOYEE MESSAGES

iSolved provides the ability to communicate with employees by adding messages. The message can be enhanced by providing a link to a website, a document with additional details and forms. The documents can include Employee Handbooks, Recently Updated Policy regarding new legislation, job-related forms, etc and you can add an acknowledgment to confirm your employees have reviewed them.

The messages can appear on the Employee Messages screen and/or the Company Information page listed under the Employee Self Service tab. Multiple messages, links and documents can be stored here for employees to access.

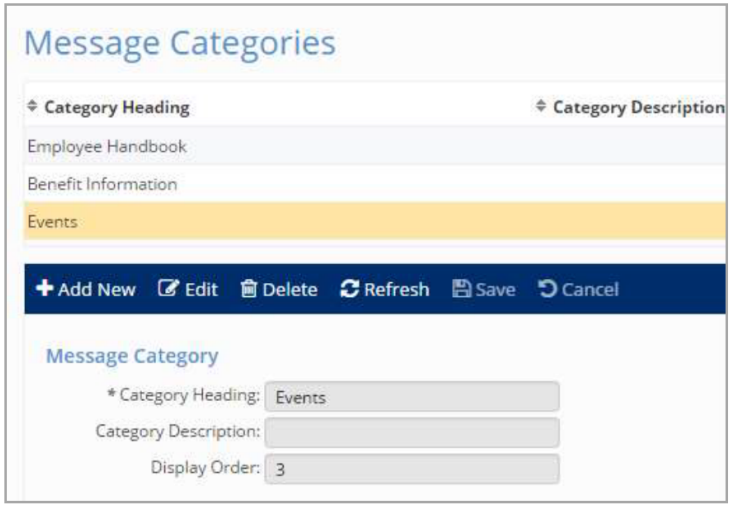
# MESSAGE CATEGORIES

Message Categories allow you to organize multiple messages into meaningful groupings. Some suggestions might be COVID-19 Updates, Company Policies, Working Remote, etc.



# MESSAGE CATEGORIES

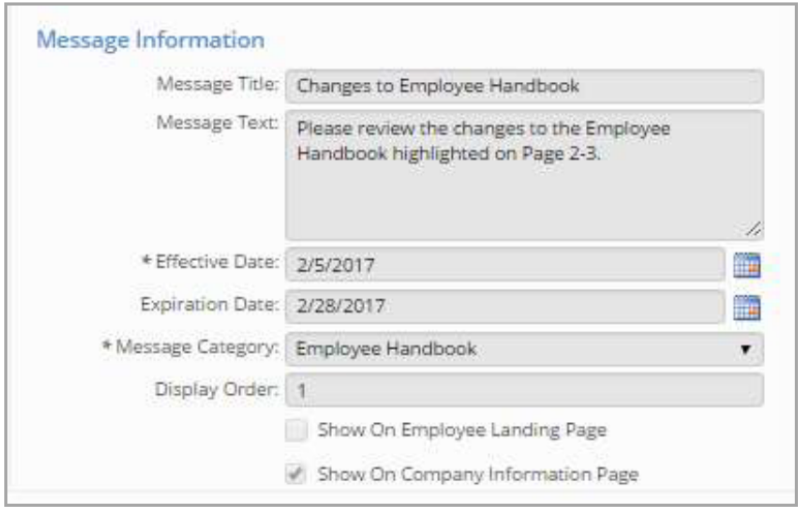
Client Management >> HR Management >> Message Categories




1) Click on the Add New icon.
2) Add a Category Heading (required).
3) Add more details with the Category Description (optional). Display Order allows you to prioritize the categories, or how they appear.

# EMPLOYEE MESSAGES

## Client Management >> HR Management >> Employee Messages




1) Message Title and Text: Add a Message Title and Message Text into these fields.
2) Effective Date: The Effective Date is a required field. The message will not appear to employees until the effective date has been reached
3) Expiration Date: An Expiration Date is optional, but can be used when a specific message should only be displayed for a certain amount of time. A message will be automatically removed once the expiration date has passed.

# EMPLOYEE MESSAGES

4) Message Category: Select the Message Category that you want this message to appear under. The drop-down box will contain all categories set up under Message Category.
5) Show on Employee Landing Page: If you select Show on Employee Landing page, the message will appear on the Employee Messages screen of ESS. A reminder will appear on the employee's welcome page.

- **Company Information Page**: You have the option of placing the message on either or both pages.

# EMPLOYEE MESSAGES

**Suggestion:** Some customers use the **Employee Message** screen for current events and topics, but use the **Company Information** screen for company policies, like the company handbook.

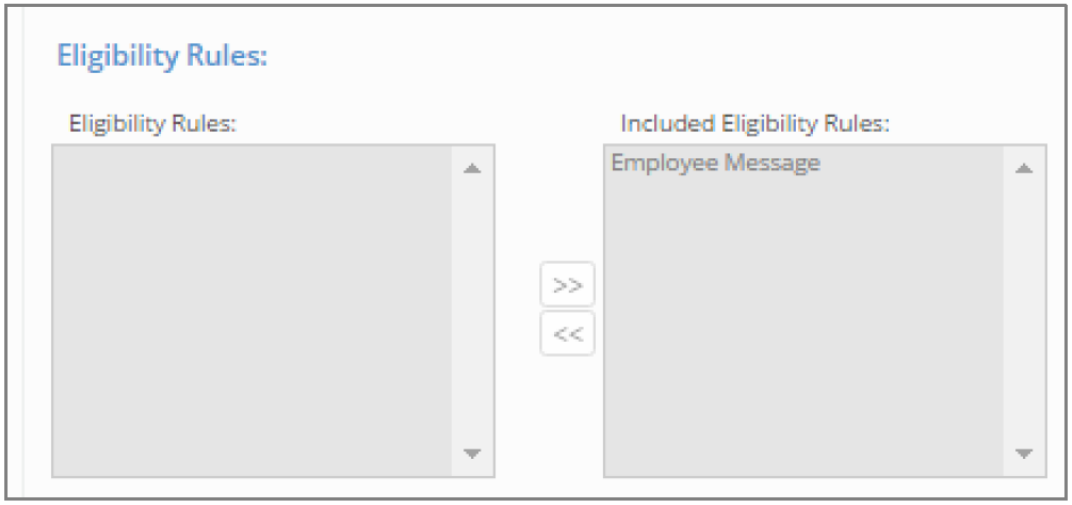
- **Legal Company Access:** If you have multiple legal companies, you can choose to display a message for the employees of one legal company, or multiple. You must select at least one. **Note:** If no company is selected, the message will be hidden from Client users. Service Bureau users will still see the messages, and can assist with checking the appropriate boxes.

# EMPLOYEE MESSAGES

## Eligibility

**Eligibility Rules** can be added to Company Messages. This limits the message to a group of employees based on the selections in the eligibility rule. We added a rule for “Full Time,” “Active” and “Work Location CA.” Once the eligibility rule is added, link it to the message.

- There is an “Eligible Employee” report or export to check the accuracy of your rules and review the eligible employees for this message.




To learn more about eligibility rules, check out this video: https://learning.myisolved.com/library/quick-help-videos/eligibility-rules

# EMPLOYEE MESSAGES

## Links

You are able to add a link to a website where information is posted. This could be your own company website, or the website of your Benefit providers.

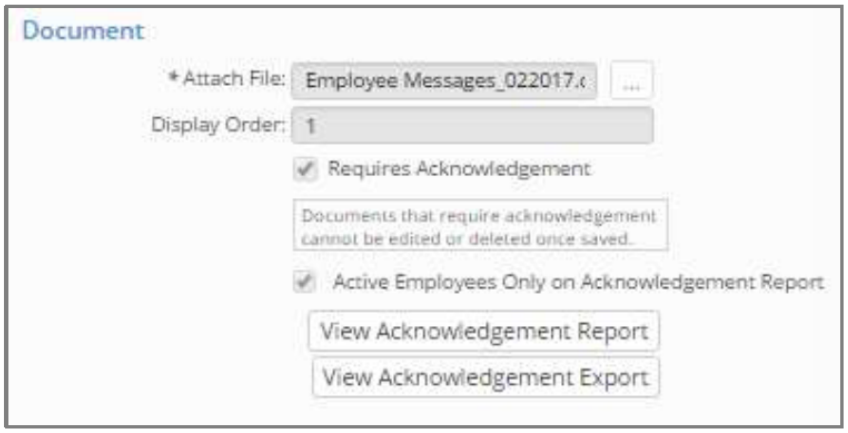
- **Link Text:** Add the text you would like to appear for your employees.
- **Link URL**: Add the URL including the http or https.
- **Display Order**: Each message may contain more than one link. You may sequence them as needed.

*For a list of helpful COVID-19 update links, visit*
https://ctrhcm.com/home/covid-19-information-center/

# EMPLOYEE MESSAGES

## Documents

You are able to add a document to your message.




Along with adding the document, you can ask for acknowledgement from your employees.

There is an Acknowledgement Report or Export, if requested.

- **Attach File:** Select the attach file button to search for your document. A file size of 4 MB to 32 MB is allowed.
- **Display Order:** Each message may contain multiple documents.
- **Requires Acknowledgement:** The employee must open the document in order to be allowed to click "Sign Acknowledgement."

*For a list of helpful COVID-19 employee communication and templates, click here* https://ctrhcm.com/home/covid-19-information-center/

# EMPLOYEE MESSAGES

## Required Acknowledgement

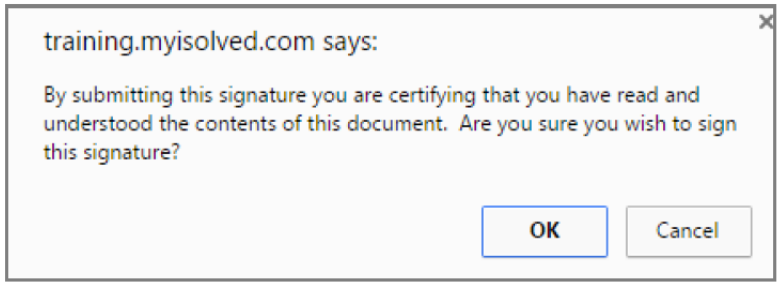
If you need an electronic signature from the employee verifying that they have read the document, click the **Requires Acknowledgement** box. This flag will trigger three additional actions.

1. The employee will see a message appear on the **Employee Welcome** page that alerts them, and links them directly to this message if added to **Employee Messages**.
2. If the message is under **Company Information**, the employee will see this message title in red indicating that they must read and acknowledge this document.

   The employee can check the box and click **Sign Acknowledgement**.

# EMPLOYEE MESSAGES

The following message appears:




3. You can obtain a list of all employees who have acknowledged reading this document by clicking the **View Acknowledgement Report** button. The report will indicate the date and time of the acknowledgement.
4. If a PDF type document is acknowledged, the electronically-signed version is placed in the list of documents on the **Employee Documents** page.

# EMPLOYEE MESSAGES

## Email Alerts

If Electronic Consent is activated for the client, the use of Email Alert reminders for any documents to be reviewed and acknowledged is available. See the conditions that will be followed when using these alerts.

> **Document Acknowledgement Email Alerts**
>
> Email alerts will be sent to employees when the following conditions are met:
>
> - The Employee Message is in "Active" status and;
> - The Employee Message is selected to show on the "Company Information" or "Employee Messages" screen and;
> - The employee is eligible for this Employee Message and;
> - The employee has not yet acknowledged all required documents and;
> - The employee has accepted electronic signature consent (applicable only for companies utilizing electronic signature consent).

Once the **Message Information**, **Eligibility** (if any), **Links** and **Documents** are added to your message, click on the **Save** icon. The Document added must Require Acknowledgement.

Once saved, a tab will appear titled **Email Alerts**. Complete the following:

1. Click on the **Edit** icon.
2. Select an **Email Template.**
   **Note:** Email Templates are set up under Workflow Setup > Email Templates. Select an **Email Type** of "Employee Messages."
3. Select the **Frequency** in days.
   **Example:** Enter "5" and email reminder acknowledgement will go out every 5 days until acknowledged.
4. Select the **Start on** date from the calendar.

# EMPLOYEE MESSAGES

**FILLABLE FORMS:**
Fillable forms can be added to messages on the **Forms** tab.
*The first step is to add the fillable form or forms on the **Client Forms** page, then the form can be selected from a dropdown menu on the **Forms** tab in messages. *(This role must be turned on at the Client User Level!)*

The form can be marked to require completion but will not be validated for completion. Manager and Supervisor access can also be allowed, per-form.

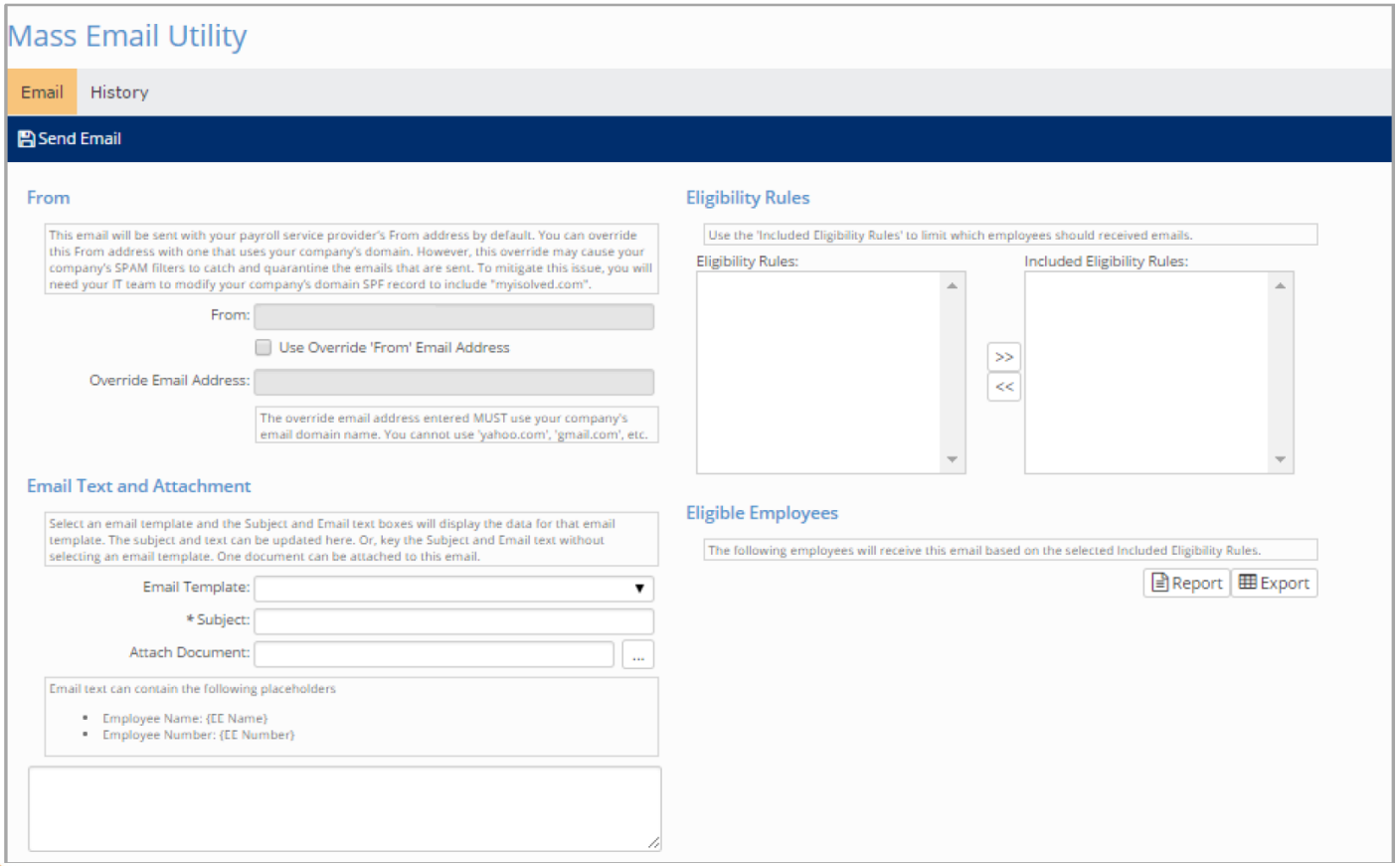
To learn more about forms, check out this training document:
https://learning.myisolved.com/library/documents/1511

# EMPLOYEE MESSAGES

# MASS E-MAIL UTILITY TOOL

The Mass Email Utility is used when a customer needs to send an email to all employees, or a selected group of employees.

Navigate to Client Management > Mass Email Utility.



# MASS E-MAIL UTILITY TOOL

Use the following steps to set up Mass Email.

1. In the **From** section of the screen:
    - Use either a generic email address supplied in the **From** field, or select the **Use Override "From" Email Address** option and the desired address.
      **Note:** If employees are not receiving emails when an override email address is in use, the user should follow the instructions in the text that is located at the bottom of the **From** section of the screen.
2. In the **Email Text and Attachment** section of the screen:
    - Select the **Email Template** from the drop-down menu. The emails available for selection in this field are created under Client Management > Workflow Setup > Email Templates.
    - The **Subject** will be populated by the subject line from the selected **Email Template**.
    - The user can attach one attachment by using the ... button to locate and attach the document. The document name is displayed.
    - If no **Email Template** is selected, the user is required to enter data for the email being sent.

# MASS E-MAIL UTILITY TOOL

3. The **Eligibility Rules** selector box on the left-hand side of the screen contains a list of all eligibility rules that have been setup for the client.
    - Use the >> button to move rules to the **Included Eligibility Rules** selection box. Rules moved to box will be used to filter the employees that receive emails. The email will be sent to an employee if any one of the selected rules applies to them. The << button is used to move a rule back to the **Eligibility Rules** box.

    **Note:** Eligibility Rules are set up under Client Management > Benefits > Eligibility Rules.
4. The **Eligible Employees** report displays the name of the document attached to the email, as well as the email text, a list of employees that will receive the email, and the Eligibility Rule that applied to each employee. The customer can review this prior to sending the email. There is also a column for employees that are missing email addresses.
5. The **History** tab at the top of the screen records the **Batch #** for the email, the date sent, and the user who sent it.

**Important:**

There is a size limitation for mass email.

- The document upload cannot exceed 4000 KB.
- Server send limit is 4500 KB, which allows for an attachment and additional text (email size = Header + Text + Attachment).
- Text must be included in the body of the email, or the email will not be sent.

# MASS E-MAIL UTILITY TOOL

## STAY IN THE KNOW, ASK QUESTIONS & JOIN US FOR OUR UPCOMING WEBINARS!

-Visit our Events Calendar here to register for our upcoming webinars.
-Have Legal Questions? Be sure to review our COVID-19 Legal Options webinar as we want to help guide you. Questions must be submitted to training@ctrhcm.com by 3pm Wednesday, March 25th.
-Check out our Resource Library here where we will post training documentation, updates, and webinar recordings.

### Upcoming Webinars:

**GROWING WITH iSOLVED (Special Update Edition)**
In this webinar, we will do a recap of the HR 6201 Bill and the updates that were made in iSolved to help employers comply. We will walk through calculations, earnings and accrual plans.
**When**: Thursday, March 26th from 1pm-2pm EST

**COVID-19 LEGAL COUNSEL & LEGAL SERVICE OPTIONS**
In this webinar, CTR will be joined by Special Guest Speaker, Attorney Valerie Faeth. Together, we will review your legal options and answer YOUR questions. To have your questions answered, please submit your questions for this webinar to training@ctrhcm.com by 3pm Wednesday, March 25th. To learn more about our guest speaker, please click here.

As requirements change and laws are passed, we will update you as soon as possible.