



## HR SERVICES INFORMATION

Prepared for



**ORLAND  
PARK**

## The Trüpp Approach



### **discover**

During the exploratory stage, we focus on:

- Learning about your business, employees, and workforce locations
- Understanding how your leave function is currently being supported
- Identifying areas that may impact transition of leave administration services to Trüpp
- Providing an explanation of services and pricing

DELIVERABLES:

- PROPOSAL OF SERVICES
- COMPLETED SERVICE AGREEMENT



### **onboard**

Once we have an agreement in place, the next steps include:

- Completing a project kick-off meeting
- Receiving client information needed for conducting leave administration activities
- Reviewing your current leave policies, timekeeping practices, and communication process
- Understanding the technology and systems currently in place
- Establishing plan for implementation of services and data/knowledge transfer
- Establishing a communication plan to introduce Trüpp to your team

DELIVERABLES:

- TRANSITION PLAN
- COMMUNICATION PLAN



## implement

Once onboarding activities are complete, Trüpp initiates:

- Conducting a leave administration assessment to establish a baseline and identify priorities
- Establishing an initial work plan outlining agreed upon priorities for the service and data transfer
- Introducing staff to their resources at Trüpp
- Handing off current leaves and associated information to Trüpp, if needed
- Educating managers on leave administration best practices and guidelines (leave request identification, processes, communication, anti-retaliation rules, etc.) and how to leverage Trüpp and established processes

DELIVERABLES:

- LEAVE ADMINISTRATION ASSESSMENT REPORT
- INITIAL WORK PLAN
- INTRODUCTION OF TRÜPP
- MANAGER TRAINING



## maintain

To ensure priorities maintain alignment with your business, Trüpp will provide:

- Recommended leave policy updates when necessary to adhere with federal, state, or local leave guidelines
- Communication updates to employees and managers with leave policy changes
- Access to leave tracking and reporting data
- Annual service reviews to reflect on past year, plan for future business needs, assess opportunities for improvement and service alignment, and update service agreement, if needed

DELIVERABLES:

- POLICY & COMPLIANCE COMMUNICATION UPDATES
- ACCESS TO REPORTING & TRACKING DATA
- ANNUAL SERVICE REVIEW

## Leave Administration Services

The following is a description of the leave administration process and activities. As part of the implementation process, Trüpp will establish a process map specific to your business, including defined hand-offs/dependencies. Our dedicated leave administration team will provide a consultative and thorough review of your current leave policies, provide expert recommendations, and come together to implement a best-in-class leave service tailored specifically for your organization. Trüpp will also provide training for managers and HR staff who are interacting with leave-taking employees to educate them on leave policies and best practices. Leave administration activities will need to operate in compliance with current, relevant leave laws, such as:

- Family and Medical Leave Act (FMLA)
- State and Local Family Leave Laws
- Employer Sponsored Leaves
- Employer Approved Personal Leaves
- Families First Coronavirus Response Act (FFCRA)
- Military leave
- Jury duty leave
- Emergency responder leave
- Domestic violence leave

## Leave Administration Steps

While the process will be further refined based on the unique client needs, below are typical steps of the leave administration process.

**Determine Eligibility.** Once Trüpp has been notified of an employee who may need to take a protected leave, they will be assigned a leave specialist who will work with them and their supervisor throughout the entire process ensuring clear and consistent communication. After notification, Trüpp will first assess whether the employee meets eligibility requirements. Once eligibility has been determined and within 5 days of leave request, Trüpp will send the employee a Notice of Eligibility and Rights & Responsibility, which states eligibility status and, if applicable, ineligibility reason(s).

If the employee is eligible to take a protected leave, the employee will also be asked to have their medical provider complete a medical certification, if applicable, within 15 days of receiving the Notice of Eligibility and Rights & Responsibility. Typically, certification is not required for employees needing to take parental leave.

**Leave Approval + Monitoring.** Once Trüpp has received the certification from the employee, Trüpp verifies the certification contains all of the necessary information to determine if the need for leave is for a qualifying reason and the amount of time off that will be required. Within 5 days of receiving complete certification information, Trüpp prepares and provides the employee with a Designation Notice. This notice provides the employee details regarding time off parameters, benefits impact (i.e., medical premium payments), time tracking and other details. Internal payroll and benefit teams are also notified following the approval of the leave.

While our dedicated leave specialist is available to employees throughout the duration of the leave, we commit to contacting the employee to check in at the mid-point of their leave of absence. The employee will be responsible for

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reporting intermittent leave usage to the employer along with updates on length of leave. The employer will need to make sure leave utilization is provided to Trüpp, which is submitted through Trüpp's customized web portal.

If an employee's certification expires and the employee needs an extension or the need for leave has changed, Trüpp will request that the employee complete a recertification. In cases where an intermittent leave has no defined end date, Trüpp will request recertification from the employee periodically (i.e. every six months).

**Return to Work.** Approximately two weeks before the leave expires, Trüpp will notify the employee of when their leave is ending and will remind the employee of any fitness for duty requirements that need to be met. The leave specialist will also confirm the return to work date with the client. This is also the time that Trüpp will communicate with the employee to see if there are any potential accommodations that need to be considered.

**ADA Interactive Process.** If it is determined that an accommodation may be needed, Trüpp will request the employee to have their medical provider complete an ADA medical certification. Once the certification is received, Trüpp will meet with the employee to conduct the interactive process in order to gather sufficient information from the employee to provide recommendation to the employer regarding if and what accommodation(s) may be reasonable for the employer to provide. Trüpp will then provide its recommendations to the employer and, following the employer's review and decision, communicate to the employee the outcome of the interactive process.

## Leave Administration Tracking + Reporting

**Leave Notification and Updates.** Employees and managers can utilize Trüpp's customized web portal to submit leave requests. Employers are provided with a portal access link that can be easily embedded in your HRIS, your company intranet, or in a company-wide communication to your employees. Is your workforce primarily in the field without access to a company computer? No problem, Trüpp also provides the ability to handle all leave activities through a special leave hotline. Leave requests are acknowledged within four hours (of standard business day) and leave submission automatically triggers a Trüpp representative within our customer service ticketing system. Communications with the employee (and other client contacts, such as the manager and HR) are also tracked in this system—maintaining a secure and confidential record of activities.

[Here is a link to a demonstration of the Trüpp's leave portal](#) and below are some screen captures.

The image displays two overlapping screenshots of the Trüpp leave administration system. The background screenshot shows the main portal interface with the Trüpp logo and navigation links: Submit New Leave, Submit Question, Submit More Info, Submit Intermittent Time, My Tickets, and Sign out. Below these links is a section titled 'How can we help you today?' with five interactive cards: 'Submit a New Leave' (provide info for eligibility), 'Submit Question' (submit question for assistance), 'Submit More Information' (provide additional info for existing cases), 'Submit Intermittent Time Taken' (provide intermittent time taken for existing leaves), and 'My Tickets' (view current historical tickets). The foreground screenshot shows the 'Trüpp Leave Administration Form' for an employee. It is divided into three main sections: 'Contact Information' (First Name, Middle Name, Last Name, Preferred Name, Email Address, Phone Number), 'Job Details' (Company Name, Job Title, Supervisor Name, Working City, Working State, Hours Worked Per Week), and 'Leave Request Details' (Hire Date). A separate 'Intermittent Time Taken' form is also shown, containing fields for Employee Name, Company Name, Name of Contact Completing the Form, Email of Contact Completing the Form, Start Date of Intermittent Leave Taken, End Date of Intermittent Leave Taken, Total Hours of Intermittent Leave Taken, and a Comments section.

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**Leave Status Tracking.** Want to know who is on leave and what their leave status is? Trüpp has you covered with real-time access to a dashboard containing the current status of each of your organization's open leaves. You'll be able to view each employee's specific type of leave, where they are in the leave process, how much leave time they have available and which dedicated Trüpp advisor is working with them. Trüpp will also provide detailed electronic documentation of leave history for record keeping.

Below are some screen captures of the leave administration dashboard. Details of information tracked and dashboard capabilities can be further shared as a live demo.

**Demo Company**

**New Incoming Leaves**

	Trüpp Repr...	Leave Main Status	Notes from Trüpp	Case #	Application Receive...	First Name*	Last Name*	Current Supervisor*	Requested Leave
Leave Admin Request		Leave Received		106240	Apr 15, 2020	Martin	Smith	David K	Aug 3,
Mason, Jack (Portal)		Processing Document		106764	Apr 14, 2020	Jack	Mason	Lance J	Aug 18,

**Continuous Protected Leaves**

	Trüpp Repr...	Leave Main Status
Kerr, Ruth (Portal)		On Leave
Doe, Edward (Portal)		Processing Document
Fields, Diane (Portal)		On Leave

**Intermittent Protected Leave**

	Trüpp Repr...	Leave Main Status
Konnor, Tate (Portal)		Return to Work Verif.
Stevens, Ashley (Portal)		Return to Work Plan
Jones, Reed (Portal)		On Leave

**Unprotected Leaves**

	Trüpp Repr...	Leave Main Status	Notes from Trüpp	Case #	Application Receive...	First Name*
Jason, Thomas (Portal)		On Leave		105886	Apr 10, 2020	Thomas
Blueberry, Jade (Portal)		Leave Received	Extension requested. Being reviewed by Dem...	105896	Jun 2, 2020	Jade

**COVID-19 Related Leaves**

	Trüpp Repr...	Leave Main Status	Notes from Trüpp	Case #	Application Receive...	First Name*
Larson, Derrick (Manual Entry)		On Leave		105711	Apr 9, 2020	Derrick
Becker, Ryan (Portal)		Designation Notice		105864	Apr 10, 2020	Ryan
Mason, Kim (Portal)		On Leave		106126	Apr 14, 2020	Kim
Roberts, Karl (Portal)		On Leave		107352	Aug 12, 2020	Kalle

**ADA**

	Trüpp Repr...	Leave Main Status	Notes from Trüpp	Case #	Application Receive...	First Name*
Panel, Christine (Manual Entry)		ADA		107259	Feb 3, 2020	Christine

**Completed Leaves**

	Trüpp Repr...	Leave Main Status	Notes from Trüpp	Case #	Application Receive...	First Name*
Poler, Veronica (Portal)		Leave Closed		106204	Dec 23, 2019	Veronica
Pierce, Jane (Portal)		Designation Notice		106117	Apr 10, 2020	Jane

**Leave Reporting.** To help your organization understand leave utilization and identify opportunities for decreasing leave length/occurrences, Trüpp provides helpful reports of leave administration activities that can be utilized for work-force planning and employee forecasting. Examples of standard reporting metrics include:

- Percentage of workforce on leave
- Average leave duration
- Types of leave taken
- Reasons for leave
- Number of leave requests including number of approvals & denials

## FFCRA Employee Leave Administration Services

In response to the additional benefits afforded to employees as a result of the COVID-19 pandemic, Trüpp has included supplemental leave services in compliance with Families First Coronavirus Response Act (FFCRA). This service includes:

- Additional data gathering to determine employee + employer eligibility;
- Determining if employees are eligible to receive Paid Sick Leave or Paid Family and Medical Leave as defined by FFCRA;
- Utilizing an IRS-compliant request form to ensure tax credits under the FFCRA;
- Informing employees of the benefits they are eligible to receive;
- Notifying the employer of employee's leave eligibility and status;
- Informing employees of the leave process, including how to log their paid sick leave and return to work instructions;
- Coordinating with the employer timekeeping/payroll contacts to ensure employee paid leave is recorded properly and to monitor employee paid leave time, when needed;
- Determining if an employee's Paid Sick Leave or Paid Family and Medical Leave also qualifies for leave under any federal, state, or local leave laws and if the leaves will run concurrently, where possible under the law(s);
- Checking in with employees and the employer to verify return to work date; and,
- Providing the employer with tracking and reporting of employee leaves.



## Benefits Administration

Trüpp's Shared Services team provides comprehensive benefits administration services. Our team of experts work hand-in-hand with your benefit brokers and carriers and serve as a convenient resource for your employees. The Shared Services team provides support M-F/8-5.

**Leading Edge.** Trüpp embraces technology to ensure employee benefits are administered in a manner that is accurate, timely, and confidential. Systems used include:

- *Trüpp proprietary benefits administration system for maintaining up-to-date employee information, eligibility, and enrollment status. In 2019, Trüpp implemented an employee portal for online enrollments and employee self-service along with an employer portal for monitoring HR metrics and program oversight.*
- *Customer service ticketing system for tracking employee and client requests (received via email or phone) and ensuring inquiries are responded to in a timely manner.*
- *DocuSign for routing of documents to one or more approvers, signers, and recipients along with secure electronic gathering of data and signature.*

**Benefits Management.** Trüpp's team of Shared Services professionals manages all aspects of employee benefit administration including:

- *Interfacing with brokers, providers and employer to properly administer activities related to employee benefits, including medical, dental, vision, 401(k), HSA, FSA, COBRA, commuter benefits, life insurance/AD&D, and disability insurance.*
- *Coordinating with brokers and payroll provider to establish a streamlined process for communication related to employee enrollments, changes and cancellations.*
- *Serving as a point of contact for employee inquiries and communications with providers and brokers.*
- *Processing terminations including providing 'Benefits at Separation' letter to departing employees to inform them of last dates of coverage, post-employment options and retirement points of contact.*
- *Day-to-day administration of benefits plans—including submission of employee enrollment additions and changes.*
- *Reconciling benefits invoices and ongoing review of benefits-related payroll deductions.*
- *Conducting benefits-related tracking and reporting in support of regulatory compliance, performance metrics, and other client-requested reports.*
- *Notifying payroll administrator (if not Trüpp) of employee deduction and contribution changes.*
- *Monitoring ACA compliance and completing ACA reporting (additional costs may apply for reporting activities if client is not utilizing ACA reporting capabilities within their HRIS/payroll system)*

**Open Enrollment.** Trüpp orchestrates the entire open enrollment process—offloading time-consuming activities associated with coordinating with brokers, communicating to employees, and gathering employee enrollment information.

- *Open enrollment project management, meeting coordination, and employee communications.*

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- *Easy-to-use online tools and resources.*
- *Coordination with benefit providers and brokers.*
- *24/7 online access to employee benefit information.*

*Timely and accurate completion and submission of enrollment data.*

## Pricing

Leave Administration services	Cost <sup>1</sup>
<b>Standard Leave Administration Services with FFCRA Employee Leave Administration Services<sup>2</sup></b> Administration and overall management of the standard employee leave process PLUS FFCRA Employee Leave Administration Services with defined points of communication, roles and responsibilities, and process map.	<b>PER LEAVE FEES (STANDARD LEAVE ADMINISTRATION)</b> <ul style="list-style-type: none"><li>◦ \$195/standard leave/per employee PLUS</li><li>◦ \$95/intermittent leave/per employee/per month</li><li>◦ \$165/hour for ADA Accommodation Requests/Interactive Process</li></ul> <b>PER LEAVE FEES (FFCRA LEAVES)</b> <ul style="list-style-type: none"><li>◦ \$20/Paid Sick Leave/per employee</li><li>◦ \$75/Paid Family and Medical Leave/per employee</li></ul> <b>ADMINISTRATION FEES</b> <ul style="list-style-type: none"><li>◦ Monthly Base Fee: \$500</li><li>◦ One-time Setup Fee: \$500</li></ul>
<b>Benefits Administration Services</b>	<ul style="list-style-type: none"><li>◦ \$18.50/employee/month</li><li>◦ One-time Setup Fee: \$500</li></ul>
<b>Out of Scope Services</b> Out of scope services will be provide on an hourly basis or a quote will be provided if performing work on a project, rather than hourly, basis.	<ul style="list-style-type: none"><li>◦ Hourly rate: \$132.00 per hour (20% off standard rate)</li></ul>

<sup>1</sup> Does not include travel beyond Portland, OR Metro area or legal counsel.

<sup>2</sup> Minimum contract requirement of three months with prepayment for setup fee and first month's base fee to initiate services.