

# Paid Leave Oregon Advisory Committee

December 6, 2023

1:00pm – 3:00pm

ZoomGov - <https://www.zoomgov.com/j/1601999817>

## Agenda

<i>Members</i>		Docket #	Topic	Purpose	Presenter
Karen Humelbaugh		1.0	<b>Welcome</b>	Inform	Karen Madden Humelbaugh &
Amanda Dalton		1.1	Member Roundtable		David Gerstenfeld
Jenny Dresler		1.2	Agency Updates		
Eric Hunter		1.3	Approval of Sept, Oct & Nov Meeting Notes		
Catie Theisen		2.0	<b>Customer Care, Outreach &amp; Communication Updates</b>	Inform	Michele Schwartz & Angela Yeager
JaJetta Dumdi		3.0	<b>Policy &amp; Program Support Updates</b>	Inform	Kelley Ofoni
Courtney Veronneau		4.0	<b>Benefits Updates</b>	Inform	Danielle Willey
Anna Richards Roberts		5.0	<b>Additional Program Updates</b>	Inform	Karen Madden Humelbaugh
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## Paid Leave Oregon Advisory Committee Docket

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**Docket Item:**

1.3 – Approval of September, October & November Meeting Notes

**Docket Summary:**

Karen Madden Humelbaugh asks committee members if they have any edits to the notes from the previous meeting, as well as the September meeting due to not meeting quorum. After feedback is addressed, the committee will vote on whether to approve the notes.

**Docket Materials:**

PDF – Paid Leave Oregon Advisory Committee Notes 11-2023

PDF – Paid Leave Oregon Advisory Committee Notes 10-2023

PDF – Paid Leave Oregon Advisory Committee Notes 09-2023

**Staff Recommendation:**

Approve notes.

Meeting:	<b>Paid Leave Oregon Advisory Committee</b>				
Date/time:	<b>September 6, 2023</b>				
Location:	Microsoft Teams				
Attendees:	P (Present) A (Absent) S (sent sub)				
	Facilitator: Karen Madden Humelbaugh Scribe: Mackenzie Jones				
<b>Members</b>		<b>Staff</b>		<b>Guest</b>	
P	Karen Madden Humelbaugh	P	Mackenzie Jones		
P	David Gerstenfeld	P	Shannon Ball		
P	Jeannine Beatrice	P	Juan Serratos		
A	Amanda Dalton (employers)	P	Danielle Willey		
P	Jenny Dresler (employers)	A	Michele Schwartz		
A	Eric Hunter (employers)	P	Angela Yeager		
A	JaJetta Dumdi (employers)	P	Kelley Ofoni		
A	Eva Rippeteau (employees)				
A	Linda Herrera (employees)				
P	Catie Theisen (employees)				
P	Courtney Veronneau (employees)				

## Agenda

Docket #	Topic	Purpose	Presenter
1.0	<b>Welcome</b>	Inform	Karen Madden Humelbaugh &
1.1	Member Roundtable		David Gerstenfeld
1.2	Agency Updates		
1.3	Approval of August Meeting Notes		

David Gerstenfeld shared agency updates. The Unemployment Insurance program is preparing to start the business testing for their modernization program. In preparation, some staff are being trained on how to test the system. The agency is trying to maintain the best customer service possible despite the lacking federal funding. Worksource centers are noticing the tight labor market and their current clients tend to be people who are facing more barriers and needing more assistance which can be more labor-intensive for staff. Call wait times in the Unemployment Insurance program are not as short as they aim for but the program is focused on getting people their benefits quickly. The UI team is in the process of hiring additional staff.

David Gerstenfeld also shared many thanks to each member of the Advisory Committee for their time and assistance with developing this program.

Quorum was not met, meeting notes will be re-evaluated for approval at the next meeting.

2.0	<b>Benefits Updates</b>	Inform	Danielle Willey
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Danielle Willey shared updates from the Benefits team. Staff from the benefits team are working closely with other teams within Paid Leave, learning about the claims that are coming through and how the system functions. They are taking note of additional training and guidance needed for staff. The team is also noting some additional changes

needed to system functionality and working with partners in the Modernization team and the technology vendor FAST to make sure the system functions in a way that supports their business processes and customers. Majority of staff on the benefits team are working hard on processing claims as quickly and accurately as possible. They are seeing an increase in phone calls and application submissions have remained fairly steady.

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3.0      **Policy & Program Support Updates**      Inform      Kelley Ofoni

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Kelley Ofoni shared updates from the Policy and Program Support team. Policy Analysts from this team have worked hard to provide support and share program knowledge across the division by answering questions from staff who are on the phones and who are processing claims.

The policy team is also tracking themes in questions or areas in policy that may need additional clarifications, and looking into ways to provide more guidance to staff and the public about the program and its policies. The Employer Programs team has been the frontline support for employers, answering questions related to the program, equivalent plans, assistance grants, etc. The Appeals team has been monitoring appeal requests and helping provide customers with clarifications and education on the program.

Shannon Ball shared legislative and administrative rule updates. The Rulemaking Advisory Committee convened last week to discuss Batch 9 administrative rules which were mostly temporary rules and a few changes needed in legislation. The team is hoping to begin the formal rulemaking process in November.

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4.0      **Customer Care, Outreach & Communication Updates**      Inform      Michele Schwartz & Angela Yeager

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Karen Humelbaugh shared updates from the Customer Care and Outreach team.

The Outreach team has been working hard to contact employees and employers to inform them of the program. They have hosted several virtual information sessions specifically for state employees and several Benefit Explained sessions for the public. Both series have been well attended. The outreach team also tabled at the Oregon State Fair along with several other weekend events.

Angela Yeager shared updates from the Communications team. The communications team is continuing to track data for both the statewide advertisement campaign as well as the website traffic. The new Paid Leave website has seen a huge increase in usage, increasing from about 12,000 users a week to about 44,000 in the first week it launched. Social media and digital media ads have a click-through rate of about double the industry standard. Billboard and bus ads have also started to show up across the state. Paid Leave is also doing weekly media briefings to provide program updates, answer questions and continue spreading the word about the program.

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5.0      **Additional Program Updates**      Inform      Karen Madden Humelbaugh

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Karen Humelbaugh shared additional updates from the program. Paid Leave currently has about 270 full time employees. Since go live, the team has deployed some contingency plans including bringing on temporary staff, having staff throughout the Oregon Employment Department assist with processing claims, and opened up the option to some staff to work overtime on weekends.

Karen also presented some very early, preliminary data since the program went live. While it's too early to see trends in data, the program is doing their due diligence to consistently monitor program usage. The presentation is provided with these notes.

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## Action Items

Action	Assigned	Due Date	Completed
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Meeting:	<b>Paid Leave Oregon Advisory Committee</b>				
Date/time:	<b>October 4, 2023</b>				
Location:	Microsoft Teams				
Attendees:	P (Present) A (Absent) S (sent sub)				
	Facilitator: Karen Madden Humelbaugh Scribe: Rebecca Royer				
<b>Members</b>		<b>Staff</b>		<b>Guest</b>	
P	Karen Madden Humelbaugh	A	Mackenzie Jones	S	Andrew Warren
A	David Gerstenfeld	P	Shannon Ball		
A	Jeannine Beatrice	P	Juan Serratos		
P	Amanda Dalton (employers)	P	Danielle Willey		
P	Jenny Dresler (employers)	A	Michele Schwartz		
P	Eric Hunter (employers)	P	Angela Yeager		
P	JaJetta Dumdi (employers)	P	Kelley Ofoni		
A	Eva Rippeteau (employees)				
A	Linda Herrera (employees)				
A	Catie Theisen (employees)				
P	Courtney Veronneau (employees)				

## Agenda

Docket #	Topic	Purpose	Presenter
1.0	<b>Welcome</b>	Inform	Karen Madden Humelbaugh
1.1	Member Roundtable		
1.2	Agency Updates		
1.3	Approval of September Meeting Notes		

No agency updates or member roundtable items. Quorum was not met at this meeting so September notes will be reviewed again at the November meeting.

2.0	<b>Customer Care, Outreach &amp; Communication Updates</b>	Inform	Andrew Warren & Angela Yeager
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Andrew Warren shared updates from the Customer Care, Outreach & Communication team. The outreach and engagement teams maintained efforts to reach employers and workers in Oregon through a variety of events including tabling or presenting at various functions that Oregon. They also just finished up with a series called, "Benefits Explained" which ran through September 28 to provide information about eligibility, how to apply, and answer questions.

Angela Yeager shared updates from Communications. The communications team is going to have a new healthcare provider video that they are going to be putting on YouTube and promoting on social media within the next few weeks. They are also working on a number of different materials for the website and continuing to keep the program's resources updated as well as working on the weekly dashboard now showing the Paid Leave data.

3.0	<b>Policy &amp; Program Support Updates</b>	Inform	Kelley Ofoni
<p>Kelley Ofoni shared policy, administrative rules and legislative updates. The policy team is preparing to have rules go to public comment in November. The latest dispatch of rules that has gone through the rules advisory committee public hearings are scheduled for November 16<sup>th</sup> and 20<sup>th</sup>. This is for a batch of rules that will be effective starting January 1<sup>st</sup>, 2024. The team is also working to update the employer and equivalent plan related materials to ensure they are still aligned with recent rule changes.</p>			
4.0	<b>Benefits Updates</b>	Inform	Danielle Willey
<p>Danielle Willey shared updates from the Benefits team. The team has been very busy processing claims. Staff are continuing to identify areas for system improvements where things could be more efficient. They are listening carefully to the feedback from customers applying for benefits as well as employers regarding how to pass information back and forth more expediently.</p>			
5.0	<b>Program &amp; Staff Demographics</b>	Inform	Karen Madden Humelbaugh
<p>Karen Madden Humelbaugh shared information on the agency dashboard which includes Paid Leave information and is updated every Wednesday. It will show what happened the previous week and then it also will show the year-to-date statistics. Paid Leave has paid about 15 million in benefits so far and approved just over 10,000 claims. 55% of the claims that have been received have been approved.</p>			
5.0	<b>Additional Program Updates</b>	Inform	Karen Madden Humelbaugh
<p>No additional updates.</p>			

Meeting:	<b>Paid Leave Oregon Advisory Committee</b>				
Date/time:	<b>November 1, 2023</b>				
Location:	Microsoft Teams				
Attendees:	P (Present) A (Absent) S (sent sub)				
	Facilitator: Karen Madden Humelbaugh Scribe: Rebecca Royer				
<b>Members</b>		<b>Staff</b>		<b>Guest</b>	
P	Karen Madden Humelbaugh	P	Mackenzie Jones		
A	David Gerstenfeld	P	Shannon Ball		
P	Jeannine Beatrice	P	Juan Serratos		
A	Amanda Dalton (employers)	P	Danielle Willey		
P	Jenny Dresler (employers)	P	Michele Schwartz		
A	Eric Hunter (employers)	P	Angela Yeager		
P	JaJetta Dumdi (employers)	P	Kelley Ofoni		
A	Eva Rippeteau (employees)				
A	Linda Herrera (employees)				
P	Catie Theisen (employees)				
P	Courtney Veronneau (employees)				

## Agenda

Docket #	Topic	Purpose	Presenter
1.0	<b>Welcome</b>	Inform	Karen Madden Humelbaugh &
1.1	Member Roundtable		Jeannine Beatrice
1.2	Agency Updates		
1.3	Approval of September & October Meeting Notes		

Courtney Veronneau shared that last week in U.S. Senate Finance Committee an Oregon business owner testified in front of that committee about his experience using the Paid Leave Oregon program and shared his gratitude.

Jeannine Beatrice, Oregon Employment Department Deputy Director, shared agency updates. The Unemployment Insurance program is paying out about \$13 million in benefits each week to about 20,000 customers. The Employment Department has been asked to talk at the House of Business and Labor Committee on Monday to provide an overview of the Paid Leave program. On Tuesday, the Employment Department's Workforce Economist Gail Krumenauer will be presenting to the Senate Labor and Business Committee. The overall project health of the Modernization project is good. The project is meeting milestones and making adjustments as needed.

Individual employers will soon be receiving a letter from the Employment Department that includes the Unemployment Insurance tax rates as well as the Paid Leave Oregon contribution rate. The letter will mail out on November 15<sup>th</sup>.

Quorum was not met, meeting notes will be reviewed for approval at the next meeting.

2.0	<b>Customer Care, Outreach &amp; Communication Updates</b>	Inform	Andrew Warren & Angela Yeager
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Andrew Warren shared updates from the Customer Care & Outreach team. The team recently wrapped up a series of trainings to Bureau of Labor and Industry (BOLI) staff, as well as a series of sessions with Department of Administrative Services (DAS) for state employees. They recently presented to healthcare providers in collaboration with the Oregon Association of Hospitals and Healthcare Systems, and attended the OHSU Rural Health Conference which connected them with several healthcare partners to meet with and present to in the near future. The Outreach team will be launching a roadshow partnering with Oregon Department of Human Services (ODHS) beginning next week.

Angela Yeager shared updates from the Communications team. Communications helped launch a new fraud webpage in 8 languages which has information for customers and the public on how to protect themselves from fraud and how to report potential fraud to the program. The team is hoping to do series of short videos about the customer experience of filing an initial application and using Frances. Planning to work in collaboration with the Outreach team for specific targeted outreach and communication to lower-wage workers in Oregon.

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3.0	<b>Policy &amp; Program Support Updates</b>	Inform	Kelley Ofoni
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Kelley Ofoni shared updates from the Policy and Program Support team:

Employer Programs Team: The team has recently taken on the administration of self-employed elections and have processed 268 self-employment cases since September 26. They have welcomed 8 additional staff to their team and are beginning to train other Paid Leave staff on to ensure they can maintain quick processing times. They have approved 640 Equivalent Plans since June.

JaJetta Dumdi asked if data on the utilization of the program from equivalent plans employers will be tracked and included in the dashboard. Equivalent plan data is required for the report given to legislators but unsure when this will be available. Will likely be an annual report and not on the dashboard.

Appeals Team: The team has welcomed 2 new staff to assist with the review of the more complicated appeals and handle representation at hearings. The appeals team has been reviewing all appeal requests that come in and when possible, are working with the customer to further explain the decision and work to resolve any issues. They currently have 425 active appeals relating to identity verification, wage information, or benefit decisions. A couple appeals are being prepared to send to the Office of Administrative Hearings. The Appeals team is also working with the Communications team to provide more guidance on the appeals process through the website.

Compliance Team: This team was officially formed last month and has a team of 12 staff dedicated to internal quality assurance. The staff on this team are currently focusing on processing claims to build their expertise while developing standards and processes for quality assurance moving forward.

Policy Team: The team is focused on preparing policy guidance and continuing rule development. There are two upcoming public hearings for Batch 9 rules, which will become effective January 1, 2024. The team is preparing to draft a number of administrative rules for Batch 10, and hope to have a Rulemaking Advisory Committee in early January, 2024. They are aiming to have Batch 10 rules become final in April, 2024.

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4.0	<b>Benefits Updates</b>	Inform	Danielle Willey
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Danielle Willey shared updates from the Benefits team. The team is making adjustments to internal processes to ensure they are reviewing documents quickly and efficiently while making good decisions. They are taking feedback from customers and staff to ensure processes make sense. The team has also been making some adjustments to the Frances Online system. They are continuing to recruit additional staff.

Courtney Veronneau suggested it would be interesting for the committee to be able to see what the claim review looks like from the staff's perspective.

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5.0	<b>2024 Contribution Rate</b>	Inform	Karen Madden Humelbaugh
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Karen Humelbaugh reminded the committee that 1% is the highest contribution rate that is currently allowed by statute. As discussed with the committee previously, the program knew they would not have enough data to change the rate for 2024 and are therefore keeping it at 1% for the upcoming year. The rate for 2025 will be evaluated once they have more program data to review.

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6.0	<b>Maximum Wage Cap</b>	Inform	Karen Madden Humelbaugh
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The original 2019 legislation for Paid Leave did link the Paid Leave maximum wage cap to the Consumer Price Index, but the intention was for it to be linked to the Social Security Wage Base Index. The program made that correction in SB913 during session. This change will take effect on January 1, 2024.

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7.0	<b>Additional Program Updates</b>	Inform	Karen Madden Humelbaugh
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Karen Humelbaugh shared program updates. The Paid Leave Oregon program currently has a little over 29,000 applications submitted. Of those claims, about 42% are bonding leave claims. The team has processed about 70% of the applications they have received. There are a number of different reasons about why claims would be denied. Some are due to fraud, some work for an employer with an equivalent plan, some who are not currently employed, some haven't earned enough wages (very small percentage) or they are denied because they have not provided appropriate documentation despite working with Paid Leave staff for several weeks.

Phone wait times have increased over last couple weeks which coincides with the fraud letters that went out. The average wait time over the last week has been about 20 minutes. Prior to this uptick, average wait times were around 8 minutes. Response times for written responses to questions are averaging at about 3 days and the team hopes to get down to 2 days soon. They have created an improved process where people can report potential fraud on the landing page of the Paid Leave website which should help.

Courtney Veronneau asked if fraud letters send out all at once or on a rolling schedule. While remaining to catch the same level of fraud, the team will not expect to see that volume of letters happen again.

Courtney Veronneau asked if there was a specific type of documentation that customers are struggling to provide along with their application. When customers use Paid Leave's forms, for example the Verification of Serious Health Condition form, they are providing all the information the team needs to process the claim. However, when choosing to provide other types of documentation they sometimes miss some information that is needed.

Juan Serratos shared some program and staffing updates. As of November, Paid Leave has transitioned into maintenance mode and feel comfortable with the workload at this time. They will continue to monitor and make adjustments to staffing as needed. As they went live, the team hired a group of temporary staff through staffing agencies to help with the initial influx of bonding claims. They have helped get completely caught up on those claims and their term ended yesterday. Paid Leave did not need to utilize the contingency plan in place for requesting help from other state agencies for assistance.

Karen also shared updates regarding committee membership. There are five committee members whose terms are ending soon, Karen will be reaching out to those individuals to discuss interest in reappointment. There are also two known openings on the committee that Karen and David Gerstenfeld are working to fill.

Jenny Dresler asked if about possible concurrency legislation. Karen shared that this is up to Senator Taylor and what she chooses to do in the Senate Labor and Business Committee bills. Jenny let the group know that she is still working the Professional Employer Organization and pursuing a fix this short session to help them be able to retain their smaller business clients.

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## Paid Leave Oregon Advisory Committee Docket

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**Docket Item:**

2.0 – Customer Care, Outreach and Communication Updates

**Docket Summary:**Customer Care & Outreach

Up-to-date program information will be providing during the meeting and will be captured in the meeting notes to follow.

Communications:

Up-to-date program information will be providing during the meeting and will be captured in the meeting notes to follow.

**Docket Materials:**

None.

**Staff Recommendation:**

None, this is an informational item only.



## Paid Leave Oregon Advisory Committee Docket

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**Docket Item:**

2.0 – Policy Updates

**Docket Summary:**

Up-to-date program information will be providing during the meeting and will be captured in the meeting notes to follow.

**Docket Materials:**

None.

**Staff Recommendation:**

None, this is an informational item only.



## Paid Leave Oregon Advisory Committee Docket

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**Docket Item:**

4.0 – Benefits Updates

**Docket Summary:**

Up-to-date program information will be providing during the meeting and will be captured in the meeting notes to follow.

**Docket Materials:**

None.

**Staff Recommendation:**

None, this is an informational item only.