

Paid Leave Oregon Advisory Committee

August 7, 2025

1:00pm – 2:30pm

Join ZoomGov Meeting

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

Members

Juan Serratos (Committee Chair)	
Amanda Dalton (employers)	Catie Theisen (employees)
Jenny Dresler (employers)	Courtney Helstein (employees)
Rich Reynolds (employers)	Anna Richards Roberts (employees)
JaJetta Dumdi (employers)	Odalís Aguilar-Aguilar (employees)

Agenda

Docket #	Topic	Purpose	Presenter
1.0	Welcome	Inform	Juan Serratos & Andrew Stolfi
1.1	Member Roundtable		
1.2	Approval of April Notes		
2.0	Quarterly Program Metrics	Inform	Juan Serratos
3.0	2025 Legislation	Inform	Juan Serratos
4.0	Contributions Rate	Inform	Ayesha Khalid
5.0	Intro to IRS Ruling	Inform	Juan Serratos

April Notes

Docket #	Topic	Purpose	Presenter
1.0	Welcome	Inform	Karen Humelbaugh & David Gerstenfeld
1.1	Member Roundtable		
1.2	OED Director's Office Update & Message		
1.3	Approval of January Notes		

- Meeting link not updated on the website properly to reflect the switch from Zoom to Microsoft Teams. Michael working with Communications Team to change immediately. Next meeting will be moved back one month (August 7th) to allow Data Team more time to gather information of the full quarter.
- Point of discussion brought up by Rich Reynolds: Do other members get feedback from their employees that there is confusion about how to use the system? Is the process looked at on a periodic basis? Rich gets feedback that some folks have difficulty understanding the system.
- We have received a broad range of feedback from both sides, and we are slowly trying to improve because the Frances Online changes do take a lot of coordination and time. We focus on both the big and small fixes. We are actively working on updating the employer side, like being able to see the benefit amounts, but we have not gotten to all the things we've gotten feedback on. We are still doing research. We also have to coordinate with Unemployment Insurance, so that makes it a broader conversation, so we make sure we are meeting both side's needs.
- From David: Mostly restating what Karen said. We have a pretty long list of things we want to change, and we are now just operationalizing it. We have shifted out of project mode and we've had 3 really big rollouts over the last 18 months in the same system. It will take us some time to get all the things done that we want to, but we have a list and part of our budget process going forward is getting additional positions for paid leave specifically to continually get feedback and adjust as people's needs change over time. Please continue to give us feedback so we continue to the right things on our radar.
- From Anna: The problem is most employees are unaware of the program. So, when they inform their employer of medical leave and employer gives them FMLA paperwork. End up coming back stating they never got any payments. Are there any current notification requirements of the employer regarding this program when the employee identifies that they need to be out for medical leave? It seems like there is some proposed legislation if an employee asks about it but the issue is they think they filled out what they needed to because that's what the employer gave them. Then they come back, and they are past the 30 days and OED doesn't use the exception of being unaware of the program as a valid reason to get benefits.
- Update from David: Jeannine Beatrice (previous Deputy Director of OED) has moved over to Oregon Youth Authority. Rosa Klein has taken over as interim Deputy Director. Rosa has lots of experience and has worked with David before when she was our Policy Advisor from the Governor's office. Most recently the interim Executive Director at the Board of Pharmacy. On June 16th, David will be moving over to (DOR) Department of Revenue, taking over as the Director. Current Revenue Director, Betsy Imholt, is moving to (DAS) Department of Administrative Services. Andrew Stolfi will take over as director for the (OED) Oregon Employment Department, coming from (DCBS) Department of Consumer and Business Services. All the shifting leaders are already coordinating about how to be successful. Sad to be going but excited for the future. Want to thank everyone that has helped contribute to improving the program. I know some changes/decisions have been hard and not popular with everyone but the feedback we have received has truly helped this program get started and improve. Want to call out Paid Leave team and thank them. David was briefly in Karen's role and to think about how we went from just an idea and now we have given out over a billion dollars in just a year and a half. Appreciate the collaboration of the Paid Leave team with this group. Really proud of the work that has been done and excited about the improvements that are to come.
- January Notes Approved

2.0 Legislative and Budget Update

Inform

Karen Humelbaugh

- Our trust fund is holding steady at six and a half months of reserves. For calendar year 2024, Ayesha estimated we would receive 131,000 applications. We ended up close to that estimate with 129,000 applications.

- This year, we are expecting to receive about 420 applications a day. Given that the program is still young, we track these estimates closely as there is a lot we still don't know about trends in Oregonians use of Paid Leave. But we are encouraged by the stability of the Trust Fund, and we are optimistic that the reserves will continue to increase very slowly.
- Over the life of the program, we have received almost 215,000 applications.
- Over the past three months we've seen a stable distribution of leave type applications. Medical leave has consistently accounted for the largest share of applications and then bonding leave. Pre-placement leave is new as of January and we have received eight applications for pre-placement leave thus far.
- Slide 4 breaks down our share of applications by leave type. So far for 2025 we are receiving about 350 applications a day. Which is a roughly 10% increase compared to the end of 2024 when we were getting about 320 applications a day.
- On March 11th we hit a major milestone of paying \$1 billion in benefits to Oregonians! As of the beginning of April we have issued over 1,100,000 individual payments to almost 116,000 unique people (849,404 consecutive leave and 258,513 intermittent leave).
- The average weeks claimed by individual has stayed consistent (7 weeks for medical leave, 6 weeks for medical leave, 10 weeks for bonding leave, and 8 weeks for safe leave).
- Slide 6 shows the average number of days it takes us to process an application from when we receive it to when we make a decision. Our average processing time is down over three weeks since our peak last summer and we have finally hit our goal since we began in 2023. We are optimistic that with support from the legislature and continual improvements we will be able to hit and exceed our goal of an average of 21 days from application to decision.
- Since December 2024, we've seen a gradual decrease in the average number of days from application received to decision. Currently, applications are being processed about 10 days faster than they were in December.
- Slide 7 shows the average days to process by leave type. Safe leave claims are processed differently than other claims as they are worked by specifically trained staff, but otherwise there is not a significant difference in how quickly we approve claims by type.
- Bonding, family, medical, and safety leave have all seen a slight decrease in the average number of days from application received to decision during January and February and then spikes again up again in March. This quarter, we've also started receiving applications for pre-placement leave.
- The graph on slide 8 shows how many calls were received each week and the light green line shows the percentage of calls that were answered within 30 minutes. Since the beginning of March, we've had several consecutive weeks where over 70% of calls were answered within 30 minutes.
- Slide 9 has additional data on how many calls we receive each month and how many are answered within 15, 30 and 60 minutes. Our call volume has stayed pretty consistent, but how quickly we answer calls has improved significantly. Notably we have almost completely eliminated wait times of over 1 hour.
- The Paid Leave Data team, in collaboration with the phone team, identified issues with the previous phone data in February 2025, which has now been corrected. As a result, the number of calls answered each month appears higher, and the percentages vary compared to the previous quarter. In March, our average speed of answer was about 19 minutes.
- You can see that our grant applications overall is still quite low, and denials are fairly high. This is generally due to misunderstanding of the grant qualifications- as an example they are not a small employer, or an employee is actually not out on leave.
- Slide 11 represents unique applicants for self-employed individuals wanting to choose to participate in Paid Leave Oregon. The applications are still slowly coming in. applications continue to come in slowly.

- Each year self-employed individuals need to provide updated tax returns. On March 3rd we sent out over 1,000 annual income verification letters and if people don't provide that information, the number of self-employed individuals covered by Paid Leave may change so we will continue to watch that.
- Slide 12 shows the employee and employer count for equivalent plans as of March 15, 2025.
- Equivalent plans are an option for employers – an employer can apply to provide a plan equivalent to the state plan through a third-party insurer or themselves.
- January 31st was the deadline for the first reports due by the Equivalent Plans that reports the number of claimants covered, number of applications received/approved/denied, and benefits paid. About 80% of the equivalent plan employers provided reports so far. Looking at the data we received, we are not confident providing you the data results at this time as there are obvious errors and so we need additional time to reach out to the businesses and clean up the self-reported information.
- Some examples are, over 12% of the businesses reported, reported no data at all. 11% of the businesses had 29% - 50% of their employee's took leave, which does not align with our uptake rate. Another example is numbers were put in the wrong columns – for example, benefits paid column reported \$5 but number of employees approved it shows dollar amounts like \$112,000, which shows they entered the data in the wrong sections of the report. Between now and the next AC meeting, we will work with the businesses to refine the data so we can bring you data at the next meeting.
- Let's move into some demographic data. Remember, all the demographic data captured on the application is optional – individuals can select "choose not to answer" on any of the questions.
- Slide 13 speaks to percent of applications received from different regions of the state. To establish consistent zip code size designations, Paid Leave staff from the Data and Outreach Teams created a custom map that assigns one of four designations based on the population density of each zip code in Oregon.
- Frontier (Green) and Urban (Red) regions of the state are applying at roughly proportional rates to the amount of people who live there. The key insight today is that Rural (Blue) Oregonians appear to be applying at lower rates, while Suburban (Orange) Oregonians appear to be applying at higher rates. This could have demographic explanations. Suburban areas have generally higher labor force participation.
- The Paid Leave Oregon claimants are trending similar to the US Census demographics. We will continue to watch this carefully that we continue to serve folks in all race groupings at a rate that is similar to the overall population in the state.
- The largest group that is out of alignment with their population levels (according to the census) are those under the 'Other' designation. Other in Race category includes: Hawaiian Pacific, Middle Eastern, Race Unknown and Race Self-Described. We will need to further explore how we interact with these groups specifically.
- Aggregating the different race/ethnicity categories used the "Least Common Methodology" which means any individual who selected more than one category was aggregated into the group that is least represented within Oregon. For example, if someone marked themselves as "American Indian" and "White" then they were aggregated into the "American Indian" group.
- Slide 15 shows a direct comparison between male/female from Paid Leave approved applicants and the Oregon Labor Force data from the Census. The US Census Bureau only tracks "male" and "female" responses without consideration for other genders and sexes. While Paid Leave data is more inclusive, which impacts percentage comparisons with the Oregon Labor Force.
- Since we last met in January, we are seeing more males apply (about 4% more) and about 3% less females. Also, more individuals are deciding to answer the gender identity question.

- We are watching carefully the income levels of folks we serve as well and this is a place where we are trending in the right direction- better parity of those served in all income levels. In 2024, it is clear, folks who receive higher wages are more likely to apply for Paid Leave Oregon.
- But we have continued education and outreach for folks earning less annually and in industries where leave has not traditionally been available and are starting to see the needle move with more folks being served.
- Our legislative concepts – which are the first four listed on slide 17 – have all passed one chamber and are starting to work their way in the second chamber.
- SB 69 – This is the omnibus bill in Senator Taylor’s committee that makes clarifications to Oregon Sick Time, Paid Leave and OFLA statutes. Clarifies that BOLI is responsible for rulemaking and oversight of Paid Leave Oregon job protections and unlawful employment practices. It also allows employers to require medical certification before restoration of an employee on Paid Leave Oregon medical leave and allows employers to require periodic reporting from the employee.
- HB 2236 – Is the PEO bill. This bill was amended and passed to only make changes to the Unemployment Insurance statutes but as stated it is also understood that Paid Leave Oregon quarterly payroll reports will be filed the same way.
- SB 1148 – Short-term disability bill just clarifies that insurance companies cannot force someone to take or apply for Paid Leave Oregon benefits before taking short-term disability.
- HB 3491 – Was amended to require Paid Leave do reports about partial days. Yesterday, it was not moved out of committee so that bill is now dead.

Questions:

- **Question:** What does “calls offered” mean?
- **Answer:** It is the total amount of times that anyone calls the Paid Leave number. It could be waited on hold too long then called back. Called the wrong number. Called and heard the hold information recommending the use of the website. Essentially any time anyone calls Paid Leave, regardless of if the call was answered or not. This is not based on individuals who call. It is specifically the number of times Paid Leave is called. If the same person calls 10 times, that is 10 offered calls.
- **Question:** Is there an option to leave a callback number and get a call back?
- **Answer:** No. The main reason is that we do not have the staffing capability for this.
- **Question:** With the 14% of the workforce that is under the equivalent plan, does that include income data?
- **Answer:** It was not a requirement, it was optional, but some businesses did give us the information. Unfortunately, some of the information was entered incorrectly so we are taking more time to go over that data and clean it up.
- **Question:** Didn’t you say you asked for the demographic info and said you got pretty good responses?
- **Answer:** We asked the insurance companies, last summer to give us supplementary information and they gave that us and we asked that same information again as a not a required box. We did demographic information as well. As we mature and do the next reporting cycles, we will have better information as well. As we have more confidence in the numbers and they are consistent, we will be able to do some additional information on the equivalent plans.
- **Question:** Regarding the 21-day benchmark. Shouldn’t you be shooting for 14 days?
- **Answer:** The 14 days is the benchmark. As a reminder we do spend 2-3 days on ID verification, employers used to have 10 days, they now have 5, so in reality our staff are doing it in around a week.
- **Statement:** With the IRS now saying they are going to share information with ICE regarding anyone using an ITIN, I believe this excludes parts of the Oregon workforces since we are not using “customer IDs” like Washington is.

- **Answer:** We are doing our best to keep things that are happening at the federal level separate from what we are doing with our program. With us being strictly a state funded program, we are in a unique but good situation to protect our customers. Unfortunately, we do not have a lot of control what the federal government does at their level. We will continue to keep folks informed on anything that affects our program.