

Paid Leave Oregon Advisory Committee

May 3, 2023

1:00pm – 3:00pm

ZoomGov - <https://www.zoomgov.com/j/1603758108>

Agenda

Members
 Karen Humelbaugh
 David Gerstenfeld
 Jeannine Beatrice
 Amanda Dalton
 Jenny Dresler
 Linda Herrera
 Eric Hunter
 Andrea Paluso
 Eva Rippeteau
 Catie Theisen
 JaJetta Dumdi

Docket #	Topic	Purpose	Presenter
1.0	Welcome	Inform	Karen Madden Humelbaugh &
1.1	Member Roundtable		David Gerstenfeld
1.2	Agency Updates		
1.3	Approval of April Meeting Notes		
2.0	Operations, Benefits & Policy Updates Legislative Updates	Inform	Danielle Willey, Shannon Ball
3.0	Customer Care, Outreach & Communication Updates	Inform	Michele Schwartz & Angela Yeager
4.0	Go-Live Staffing Plan	Inform	Juan Serratos
5.0	Additional Program Updates	Inform	Karen Madden Humelbaugh



Paid Leave Oregon Advisory Committee Docket

Docket Item:

1.3 – Approval of April Meeting Notes

Docket Summary:

Karen Madden Humelbaugh asks committee members if they have any edits to the notes from the previous meeting. After feedback is addressed, the committee will vote on whether to approve the notes.

Docket Materials:

PDF – Paid Leave Oregon Advisory Committee Notes 04-2023

Staff Recommendation:

Approve notes.

Meeting:	Paid Leave Oregon Advisory Committee				
Date/time:	April 5, 2023				
Location:	Microsoft Teams				
Attendees:	P (Present) A (Absent) S (sent sub)				
	Facilitator: Karen Madden Humelbaugh Scribe: Mackenzie Jones				
Members		Staff		Guest	
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		
A	Jenny Dresler (employers)	P	Michele Schwartz		
P	Eric Hunter (employers)	P	Angela Yeager		
P	JaJetta Dumdi (employers)	A	Rachel Bruneau		
P	Andrea Paluso (employees)				
P	Eva Rippeteau (employees)				
A	Linda Herrera (employees)				
P	Catie Theisen (employees)				

Agenda

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

David Gerstenfeld shared agency updates. The Employment Department (OED) has been busy during legislative session. Aside from the Paid Leave legislative concepts, the agency also has a bill that would expand the Workshare program, which has passed in the House and is on its way to the Senate. Additionally, there is a bill related to information sharing that would affect how the agency runs the Unemployment Insurance (UI) and Paid Leave programs.

The Workforce Operations division is piloting a new service delivery model, offering virtual scheduling tools and virtual appointments. These allow for any Workforce staff to assist customers from anywhere in the state. The pilot is showing positive results and has allowed people to get appointments sooner, and fewer appointments needing to be canceled or rescheduled.

There has been a focus on fraud and various identity verification tools in the UI program. The U.S. Department of Labor released a report on the need for their department and for states to focus on equity issues when handling identity verification. The report also featured a couple paragraphs commending OED's approach for completing an independent review to look for disparate impacts and taking corrective actions after noticing that some communities were experiencing difficulties getting through the facial recognition ID verification process.

No comments or concerns on March meeting minutes, notes approved.

2.0	Paid Leave Hiring Update	Inform	Juan Serratos
<p>Juan Serratos reviewed the updates on the Paid Leave team’s hiring and recruitment plans. The team intends to hire staff between now and June to ensure there’s time to get all staff trained and prepared prior to Benefits go-live. They are optimistic and have received a lot of interest.</p> <p>Eva Rippeteau asked if there was a breakdown of how many bilingual staff are targeted in each of the 11 languages. Majority of bilingual applicants so far have been bilingual in English and Spanish. The team has recently been posting some recruitments with bilingual requirements in other languages.</p> <p>Eva Rippeteau asked if the committee could assist with sharing and boosting recruitments. The Paid Leave team would appreciate any assistance the committee members could offer with encouraging people to apply. Jobs openings are listed on the website at this link: https://paidleave.oregon.gov/jobs/</p>			
3.0	2023-2025 Agency Request Budget	Inform	Karen Madden Humelbaugh
<p>Karen Humelbaugh shared budget updates. The program is currently utilizing the general fund loan and will soon need to repay using funds from the trust. Employers are required to file first quarter 2023 reports by May 1. The program should have more data to share at the next committee meeting and will continue to provide updates moving forward.</p>			
4.0	Operations, Benefits & Policy Updates Legislative Updates	Inform	Danielle Willey, Shannon Ball, Karen Madden Humelbaugh
<p>Shannon Ball shared legislative updates. There have been about 2,900 bills dropped so far in this legislative session. Of those, Paid Leave is closely tracking 8 that could have an impact on the program.</p> <p>Danielle Willey shared updates on benefits and operations. The team has welcomed two new members to the Benefits Management Team. The definition phase for the Frances Online system is complete and beginning this month, staff will begin testing functionality to ensure the system is useable, easy to understand and to identify any technical issues that need to be resolved prior to launch. Paid Leave is also working with partners from the Modernization team and the FAST vendor to develop technical training for staff on the Frances Online system in conjunction with some of the more technical workflow processes.</p> <p>The team received about 3,000 Declarations of Intent which informs about how many equivalent plan applications they should expect to see. So far, the team has received 1,400 applications and have approved 1,168. The deadline to submit an equivalent plan application is on May 1.</p>			
5.0	Customer Care, Outreach & Communication Updates	Inform	Michele Schwartz & Angela Yeager
<p>Michele Schwartz provided updates on the team’s customer care, outreach and engagement efforts. An internal workgroup was developed to identify and outline Paid Leave’s customer care approach, which can now be found on the website: https://paidleavecontact.oregon.gov/hc/en-us/requests/new. All staff will receive training on this new customer care approach.</p> <p>The outreach and engagement team has reached over 22,000 workers and employers in Oregon through a variety of efforts. April is child abuse prevention month and sexual assault action month so the Paid Leave team is partnering with two non-profits and hosting two events this month which can be found online at: https://paidleave.oregon.gov/news-and-events/. One of the events is specifically for health care providers, and committee members are encouraged to share details with their networks.</p>			

Eva Rippeteau asked if the event for “healthcare” is for both physical and behavioral/mental health providers. Mental health providers are welcome and encouraged to join session but Michele was unsure if the continuing education units would apply to mental/behavioral health providers or not.

Eva Rippeteau mentioned that she works with folks who work in case management and program work in behavioral health and housing services and suggested that she may be able to help coordinate opportunities for Paid Leave to provide trainings to her networks.

Angela Yeager shared communication updates. Communications team is working on the next phase of the statewide campaign for employees and will be looking at Brink’s media plan recommendations next week. The next phase of the Paid Leave website will also roll out in Summer. The updated website will feature a benefits calculator, eligibility quiz, employee toolkit, an appeals page and additional information about benefits. The current website is already available in 5 languages but the new iteration will also be available in Korean and Arabic. A new jobs brochure has been created and translated in 12 and will be available at outreach events. The team is also launching the final phase of the employer ads on social media, which is completely focused on reminding employers that payroll reports are due on May 1.

6.0	Additional Program Updates	Inform	Karen Madden Humelbaugh
-----	-----------------------------------	--------	-------------------------

Karen Humelbaugh closed the meeting with a few additional program updates. Paid Leave will have some rulemaking needs post-session and will likely need to submit some as temporary rules which would become permanent at a later date. These topics will be discussed with the Rulemaking Advisory Committee (RAC).

The RAC will be meeting next week to discuss Batch 7 rules on May 12th from 1:00-4:00pm and again the following Monday 17th from 9:00-11:00am.

Action Items

Action	Assigned	Due Date	Completed

Paid Leave Oregon Advisory Committee Docket

Docket Item:

2.0 – Operations, Benefits & Policy Updates

Docket Summary:*Hiring Update*

Paid Leave Oregon's Policy and Program Support section welcomed Rebecca (Vecca) Ruby as Appeals Processing and Support Manager and expanded the policy team with four new analysts. There are also ongoing recruitments for the employer programs unit and policy and compliance units.

Frances Testing

Twenty-five Paid Leave Oregon staff members were trained on Frances testing. Many have started testing on specific program areas and the rest will start in early May. The testers are completing numerous testing situations in Frances to ensure that the system is working as expected before the benefits program launches in September. The testers findings are recorded and Paid Leave leadership will start reviewing findings in the coming weeks.

Docket Materials:

None

Staff Recommendation:

None, this is an informational item only.

Paid Leave Oregon Advisory Committee Docket

Docket Item:

2.1 – Legislation

Docket Summary:

The 2023 Legislative Session began January 17, 2023. As of April 26, 2023, there are over 2,900 bills that have been introduced so far. Of the 2,900 bills, below is a high level summary of the eight bills the Paid Leave Oregon program is watching as they relate directly to Paid Leave Oregon:

Bill Number	Brief Description	Status of Bill
HB 2290	Paid Leave Oregon’s legislative concept to allow the Oregon Department of Revenue to share information with Oregon Employment Department.	1/30/23 - Passed out of Business & Labor and referred to Ways & Means
SB 31	A Engrossed - Requires Oregon Employment Department to determine no later than 8/11/23 if the Paid Leave Oregon Trust Fund is solvent with respect to benefits and grants anticipated to be paid. If the department does not feel it is solvent, to delay the paying of benefits and reevaluate in a quarter.	3/21/23 – Passed out of Labor & Business 4/5/23 – Passed Senate Floor 4/24/23 – Passed out of Business & Labor
SB 205	A Engrossed - Department of Revenue’s legislative concept allows Paid Leave Oregon and Department of Revenue to share information for detecting potential identity theft or fraudulent claims.	4/3/23 – Passed out of Finance & Revenue 4/12/23 – Passed Senate Floor 5/3/23 – Public hearing scheduled at Revenue
SB 593	Requires Oregon Employment Department to study issues related to Paid Leave Oregon and submit a report by 9/15/24.	4/4/23 – Passed out of Labor & Business and referred to Rules
SB 881	A Engrossed – Allows employer size for worker leasing companies to be calculated at the client employer level beginning July 1, 2024. After July 1, 2024, allows worker leasing companies to file amended returns to be reimbursed contributions previously paid.	3/28/23 – Passed out of Labor & Business 4/11/23 – Passed Senate Floor and referred to Business & Labor
SB 912	A Engrossed - Paid Leave Oregon’s legislative concept to expand overpayments and create a new penalty for equivalent plan employers that don’t follow through.	3/16/23 – Passed out of Labor & Business

		3/23/23 – Passed Senate Floor 4/26/23 – Passed out of Business & Labor
SB 913	A Engrossed - Paid Leave Oregon’s legislative concept that has several corrections and housekeeping changes to the Paid Leave Oregon statute.	3/16/23 – Passed out of Labor & Business 3/27/23 – Passed Senate Floor 4/26/23 – Passed out of Business & Labor
SB 999	B Engrossed – Makes changes to OFLA to define the one-year period and family member definition. Clarifies in OFLA and Paid Leave Oregon that an equivalent position is a position located within 50 miles of original job site. Permits employers to deduct money from employee’s pay who has returned from Paid Leave when the employer advanced certain health care expenses for the employee while on leave.	4/4/23 – Passed out of Labor & Business 4/18/23 – Passed out of Rules 4/25/23 – Passed Senate Floor

Docket Materials:

N/A

Staff Recommendation:

None, this is an informational item only.

Paid Leave Oregon Advisory Committee Docket

Docket Item:

3.0 – Customer Care, Outreach & Communications

Docket Summary:

Customer Care & Outreach

The Customer Care & Outreach team is developing guidelines and processes to support customers filing claims, in alignment with our Customer Care Principles. We hosted the [Victim Rights Law Center](#) and the [Oregon Law Center](#) in April to provide training for staff on privacy and confidentiality.

There are 51 unions and an estimated 296,410 members who covered by Paid Leave Oregon. Our team has reached out to 61% of unions and made contact with the top 10 largest unions in the state. We have presented to 45% of unions, either directly or through our partnership with the AFL-CIO and AFSCME.

The next phase of our work includes:

- Working with our partners to ensure that local unions have information about the program
- Organize Spanish language presentations for union leaders and members
- Drop off literature to local offices
- Table at union events including the Labor Notes Troublemakers School and the Oregon Tradeswomen’s Career Fair in May

In collaboration with our Communications Team, we are seeking employer, provider, and employee testimonials. Our first testimonial, done in partnership with [Prevent Child Abuse Oregon](#) (PCAP), is available on Youtube and social media: <https://www.youtube.com/watch?v=QwnYp3APteg&feature=youtu.be>

Communications

Web pages currently being drafted and translated for the next phase of our website, which is scheduled to go live in August around Frances Online going up for employees. New features include a benefits calculator, video tutorial for benefits for employees, employee toolkit, and an eligibility quiz. The website will be “frozen” for new content and major updates from June-August while the website vendor makes updates and language changes. Website will add Korean and Arabic.

Employee campaign for statewide marketing is currently in planning phase. Plan is for a mix of radio, digital media (OregonLive, etc), social media ads, TV, billboards and transit ads, depending on the areas. Billboards are focused on rural areas that don’t as much other media. Billboard locations will be in Pendleton, Bend, Klamath Falls, Woodburn, Newport and St. Helens.

Paid Leave Oregon Advisory Committee Docket

Docket Item:

4.0 – Go-Live Plan

Docket Summary:

A summary of the Go Live plan will be provided to inform the Advisory Committee of the pre-go live planning and the go live work that is planned. This includes a description of work expected and how it will be addressed as well as a contingency plan.

Docket Materials:

PDF – Go-Live Summary

Staff Recommendation:

None, this is an informational item only.



Paid Leave Oregon Go Live and Staffing Contingency Executive Summary

April 2023

The purpose of this document is to summarize the activities to be performed before program go live and as the program is implemented. This includes a summary of the workload expected, capacity to address workload and some actions to take in case that the Paid Leave team is not able to manage the workload. The go live is centering two core priorities; issuing benefit payments within two weeks from the time that a complete claim is filed and ensuring that the phone hold times are reasonable (90% of calls addressed within 15 minutes).

Utilizing our best forecasting data that includes sibling state data, Oregon unemployment insurance info and economic development data we anticipate 12,000 Paid Leave benefits claims per month in average during the first 16 months. The first expected surge of claims is anticipated to be 41,000 comprised of 32,000 bonding and 9,000 other leave type claims at program go live. Based on expected claims at go live on August 14, 2023 and our statutory start of Paid Leave Oregon on September 3, 2023, we are expecting to issue payments no later than September 19, 2023 for all complete claims received in August. Post this initial claims period we expect payment to be made within two weeks of completion of benefits application.

Phones will be staffed with 70 team members including Compliance and Administrative Specialists and they will be handling 36 calls per day for a total of 2,520 calls. This accounts for call outs and productivity metrics. We aim to answer 90% of calls within 15 minutes.

Claims will be processed by 157 staff. This includes Compliance specialists, Eligibility Specialists Investigators. With an expectation of processing a claim within 20 minutes, 2,826 claims will be processed daily. Additionally, all Paid Leave staff, including operational staff will be trained and processing claims at program go live in between their core work.

The Learning and Development team is developing intensive learning and development strategies for both managers and staff. Highlights of principles being covered: program and technical orientation as well as customer and trauma informed care.

Paid Leave's Program Equity and Innovation team will work with the Modernization team to establish live, daily, weekly and monthly production reports that can be analyzed at go live. These reports will be used to make decisions on increasing staffing, process improvements or staffing reassignments. Additionally, Program leadership will establish a go live support plan with Modernization and our vendor, Fast, to ensure that issues and barriers are addressed timely and to ensure streamlined communication. Daily huddles between Paid Leave, Modernization and our vendor, Fast, will occur to discuss issues, assign them for resolution and establish priority.

Paid Leave Oregon is actively engaged in contingency planning for our go live in case any of our above listed factors, elements are underestimates, or volumes occur at a different cadence than expected. We will be reviewing and adjusting in the moment as data is received but we are also planning in advance to train staff internal to other Divisions inside OED as well as recruiting for help from other state agencies.



The idea behind early identification and training is that we will be able to deploy staff to work primarily on bonding claims as soon as we see any unanticipated uptick in volume. Training is only three days long as contingency staff will assist with bonding claims almost exclusively reducing the need for equipment or in depth technical training. Jabber soft phone, Teams and Frances Online access are the only known requirements.

Activation points have been identified that will indicate a need to tap into these contingency staffing plans. Thresholds are different for internal back up versus assistance from other agencies and include; percentage of call answer times over 15 minutes, incoming claims outpacing processed claims, claims processing indicates difficulty in issuing payments within two weeks, investigators being pulled away from primary work to assist with claims processing.

We will continue to communicate regularly with partners, community members, our advisory committee, legislators and the governor regarding all aspects of this plan.