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A Complete Guide
To An Optimized
Leave Management
Process

Managing leave of absences is a lot.
A lot a lot.

What does it mean to effectively manage a leave of absence? When does the process actually start? When does it really end? Are you and your organization legally compliant? What level of support is needed for your employees to have a positive experience? And what sort of support do People Teams need in order to deliver the care required without pulling their own hair out?

If merely reading the questions above caused an uptick in anxiety (sorry about that) you are far from alone. The truth is, while workforces spread out across the country and leave requests continue their upward trajectory, HR Managers are struggling to keep up with the administrative and managerial burdens that come along with the leave management process.

What we're seeing in today's LOA management landscape is leading to burn-out within HR, employee turnover from a sub-par leave experience, and uninformed managers exposing your companies to legal risk.

Fortunately, there are brighter days ahead when it comes to managing leave, and following this guide will give you the tips and tools you need to optimize your leave process and make it an easy and positive experience for all parties involved.
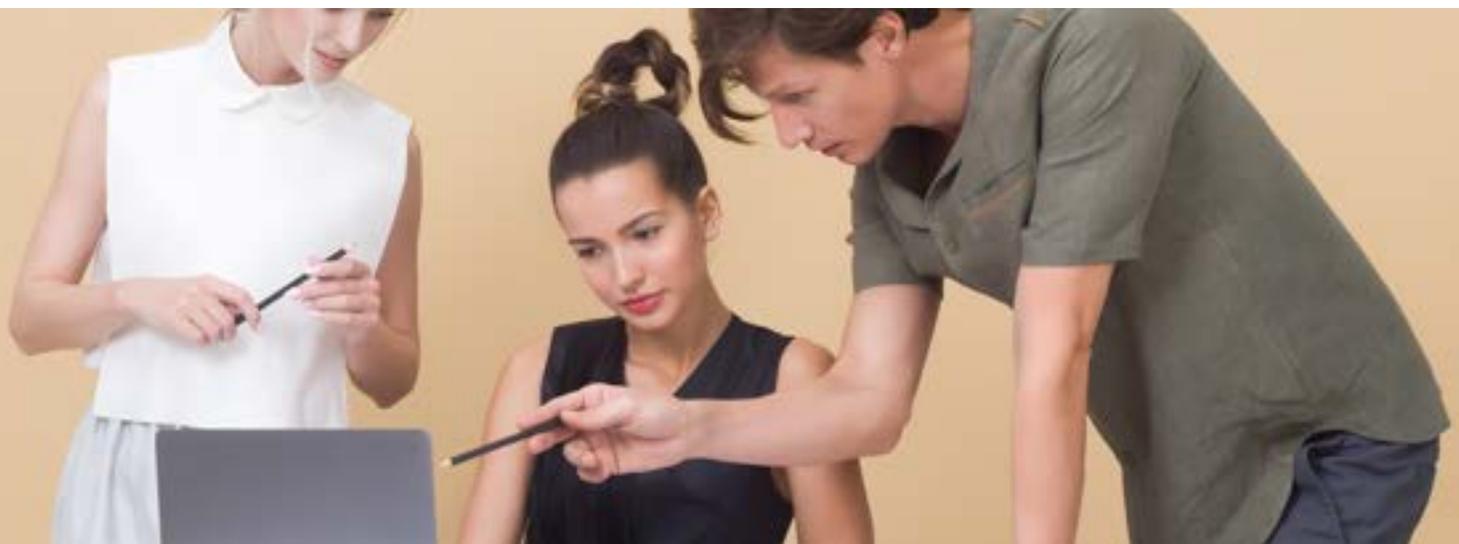
Step 1: Audit Exising Processes

Yay auditing! To be fair, we never promised that a guide to optimizing leave management would glitz and glamor from start to finish. While we're well aware that auditing processes might not exactly cause you to jump out of bed in the morning, we can't emphasize enough how vital this is for making your life easier in the long run.

When auditing your process today, make a list of which elements are manual and which of those can be automated. Automation does more than alleviate administrative burdens and streamline communication and visibility, automation can mitigate the risk of human error as well. When it comes to leave, human error can be costly to any organization's bottom line.

To start, think of the lifecycle of a leave. How are you communicating with your employees and their managers when a leave request comes in? How are you tracking their pay and their return date? How are you educating all parties involved about what forms need to be filled, where they need to be sent and when?

When an employee is on leave, are you giving managers the resources they need to know what they can and can't say? When the employee is ready to return, do you have a process in place so they can have a smooth, warm landing back into the workplace.

An effective leave process heavily factors all of these elements, but if you don't have all of these systems in place today that's okay, this is merely a guide to help get you where you want to be when managing leaves. Starting by auditing where you have gaps and manual inefficiencies is vital.

Step 2: Focus On The Human

Optimization isn't only about making processes easier, it's also about allocating your precious energy in a way that will be the most impactful. A managed leave is only as successful as the employee is happy upon their re-acclimation into work life. Putting emphasis on what can be done to improve the level of support employees feel during their leave journey will help you create the optimal leave experience and save you from having a disgruntled employee who comes back with only one foot in the door.

When an employee has a critical life moment and needs to take a leave, oftentimes it's also when they are feeling the most pain, the most exhausted, the most sadness, the most human. This is precisely the moment in their lives where they need to be treated like one, and the last thing they need is a cold, confusing process where they feel like an afterthought. Nobody should have to dial up a call center when trying to figure out the details of their leave.

Proactively preparing materials and outlining steps that employees must take when going on leave can give them peace of mind that their leave is in good hands, allowing them to focus on what's most important in their time of need.

If you've been in the game for a minute then you know some leaves go exactly according to plan, and others can take unpredictable twists and turns that require major attention. Providing human support to help them navigate hiccups and areas of ambiguity around their leave can make a massive difference in how they view their leave experience.

Offering human-to-human support when your people need it most can be a big ask on People Teams that are already strapped for bandwidth, but will provide the optimal experience for your company's most valuable asset, its people.
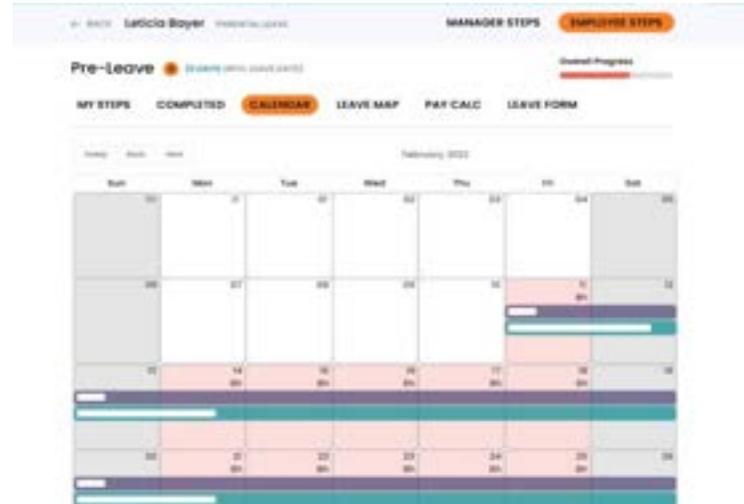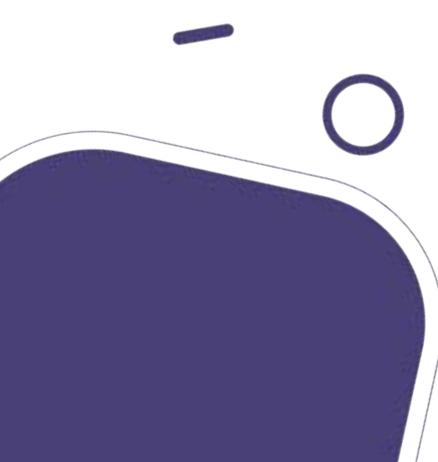
Step 3: Centralize Your Calendaring

Spreadsheets and calendar reminders and fever dreams, oh my! If you're like most people, your LOA management process falls somewhere between a dumpster fire and a cluster (redacted). An endless ribbon of Excel tabs with convoluted leave information that constantly needs to be updated as leaves come and go.

Sending employees reminders of when docs need to be filled or when an employee is returning so you can then manually email their boss has drowned out your outlook calendar and blown up your pop-ups.

If you've audited your processes as we recommended in Section 2, you likely didn't have to think for too long before getting to all the manual tracking you have to do on the daily. Did someone's leave dates change? When are their Paid Family Leave benefits running out? Does Payroll know? Has their manager been notified they are returning to work in two weeks? Where did I file that document again?

If you're looking at your process today and all of them are manual, we feel your pain. Take the time to evaluate technologies that are designed specifically to remove these administrative burdens and keep everything in an easy-to-navigate, centralized location. We know this is the part of the job you enjoy the least, and optimizing this area of leave management will give you more time to do quite literally anything else. We recommend taking that time to focus on caring for your employees, which is likely why you got into this biz to begin with.

Step 4: Keep Everyone In The Loop

Communication breakdowns are the death knell to an optimized leave experience and a breeding ground for compliance risk. With your leave tracking all in one place, now you need to ensure that everyone is on the same page for a given leave. From the employee themselves, to their manager to payroll, keeping the right people in the know at each stage of a leave is imperative to a positive leave experience and will make your leave management process silky smooth.

Managers should not only be informed that their employee is taking a leave, but they should be informed on what type of leave it is they are taking, when they'll return back to work, and what they need to be aware of as it pertains to how they can and can't interact with an employee on leave. An involved and informed manager is a tremendous resource for leave efficacy and looping them in throughout is the best way to accomplish this.

Similarly, as leave details change, whether a start date shifts or FMLA benefits are ending part-way through a leave, keeping payroll in the loop will ensure that your people are getting paid the right amount from the right sources at all times.

The more connected each stakeholder is for any given leave, the better the leave management process becomes. With everyone on the same page, you're setting yourself up for a successful leave journey for all parties involved.

Step 5: Provide Valuable Resources

Nothing rocks the leave of absence boat like a lawsuit, so developing an easy-to-access resource center with on-demand information that offers everything from managerial tips for re-boarding their employee, to the latest leave law breakdowns will pay dividends for you in spades.
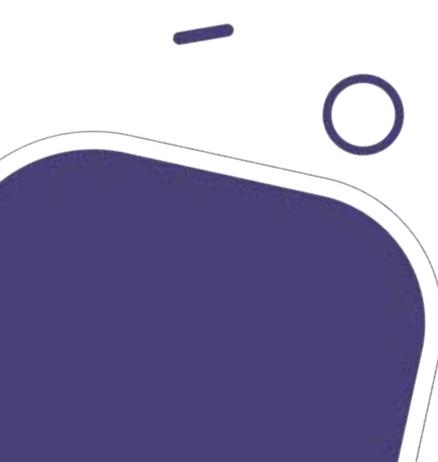
Further, you can leverage a resource center to help you with Section 5 and keep everyone in the loop. The less work people need to do in order to get informed the better. The more informed people are, the more compliance risk you mitigate, and the more compliance risk you mitigate the more protected your organization will be from costly lawsuits and employee turnover.

Leave laws themselves can be their own beast to get your arms around. Feverish Google searching and scanning through legal jargon is enough to keep the most diligent HR manager up at night. And that's just for navigating leave laws in their most common form, things can get really stressful when a leave goes off the rails (which happens more than you'd think).

Deferring to labor and employment experts to ensure compliance might be your best move. They can act as a resource for you or your employees when navigating the intricacies of complex leaves becomes more than you feel comfortable with.

Giving your people the gift of guidance and support on a leave journey through resources that are easy-to-access and understand will optimize your leave management process and lead to happier employees and increased retention.

Make no mistake, it can be daunting and cumbersome to take a long honest look at your leave management processes.

The value of auditing your processes and seeking a better way to manage leave in this new era of work cannot be overstated. You'll save time, money, reduce compliance risks and have happier employees. Oh yeah, you'll also be freed up to do the work you actually love doing.

If you're thinking to yourself that you don't even know where to find the time to begin it's okay, Tilt can help. We're experts who provide a world-class leave management solution so you can go from dumpster fire to optimized in no time. Whether you're looking for someone else to do the dirty work or just have questions, we're here to chat.

About Tilt
Tilt is leading the charge in all things leave of absence management through easy-to-use tech and human touch. Since 2016, our proprietary platform and Empathy Warriors have been helping customers make leave not suck by e liminating administrative burdens, keeping companies compliant, and providing a truly positive and supportive leave of absence experience for their people. Learn more at hellotilt.com.