

The background of the slide is a scenic landscape photograph of a calm lake reflecting a forested mountain range under a hazy sky. The text is overlaid on a semi-transparent white band across the middle of the image.

VSDP Employer Training Guide

Short-Term Disability and Long-Term Disability Management

April 2015



NaTasha Grimes LEAD ACCOUNT COORDINATOR

844-507-5391

P.O. Box 6248
Broomfield, CO 80021

vdpsupport@reedgroup.com

www.reedgroup.com



Tameka Powell ACCOUNT COORDINATOR

844-507-5391

P.O. Box 6248
Broomfield, CO 80021

vdpsupport@reedgroup.com

www.reedgroup.com



Curt Stepan ACCOUNT EXECUTIVE

D: 720.279-3081
C: 303.517-9804

10155 Westmoor Drive, Suite 210
Westminster, CO 80021

cstepan@reedgroup.com

www.reedgroup.com



Margaret Thomas PROGRAM MANAGER

D: 303.407.0698
C: 303.324.9278

10155 Westmoor Drive, Suite 210
Westminster, CO 80021

mthomas@reedgroup.com

www.reedgroup.com

Printed Materials (also available online)

- Training Handout
- “Test Your Knowledge” Quiz
- Training Feedback Form
- Quick Reference Card (QRC) for Employers
- Wallet Cards

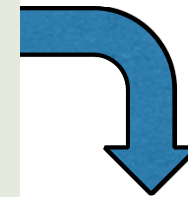
Additional Materials (available online only at www.reedgroup.com/vsdp-claims)

- Employer Training Guide (this document)
- Talking Points & Email template
- Access Request Form
- LeavePro[™] Reference Manual



How this transition impacts you and your employees

- New notification processes
- Reed Group services
- Information exchange and technology
- LeavePro™ Self-Service Portal
- New Daily Action Report (DAR)
- Roles of service teams
- Education & Outreach services
- Managing employee communication
- Getting help



Please refer to the “Test Your Knowledge” sheet in your training packet

Introduction to the Managed Disability TPA Transition to Reed Group

Your third-party administrator (or, TPA) for Short-Term Disability and Long-Term Disability management is changing from Unum to Reed Group on May 1, 2015

Even though a change is ahead, all plan benefits remain the same

Reed Group provides numerous services and tools that benefit you as an employer:

- We **assign nurse case managers** to every claim
- Our case management services are consistent and in compliance with your disability plans, and always with a **focus on medically appropriate return to work**
- Our systems **automate tasks** that are the common source of manual errors when submitting claims
- Eligible **member information** is integrated into our systems

Why Reed Group?

We help you manage
employee disability absence

- **absence management** administration
- integrated **technology** solutions
- **clinical model** that
reference to Disability Guidelines
- focus on **medically appropriate return to work**

Employers and employees have access to a
Self-Service Portal called LeavePro™.

- online **website**
- access **reports**
- check **non-clinical** disability claims statuses
- assures medical claim detail for your employees is **completely secured**

Visit reedgroup.com for more information



What Exactly Changes on May 1?

As of Apr 30		On May 1 and After
Long-Term Disability Claims Information	Long-Term Disability claims information is provided to VRS from Unum	Long-Term Disability claims information is provided to VRS from Reed Group
		have ended
		Contact Unum for: Short-Term Disability claims with a Date of Disability prior to May 1
		distributed to designated contacts
		Employers are no longer contacted for salary information; Employers continue to be contacted for disability credits

What is Different with Reed Group?

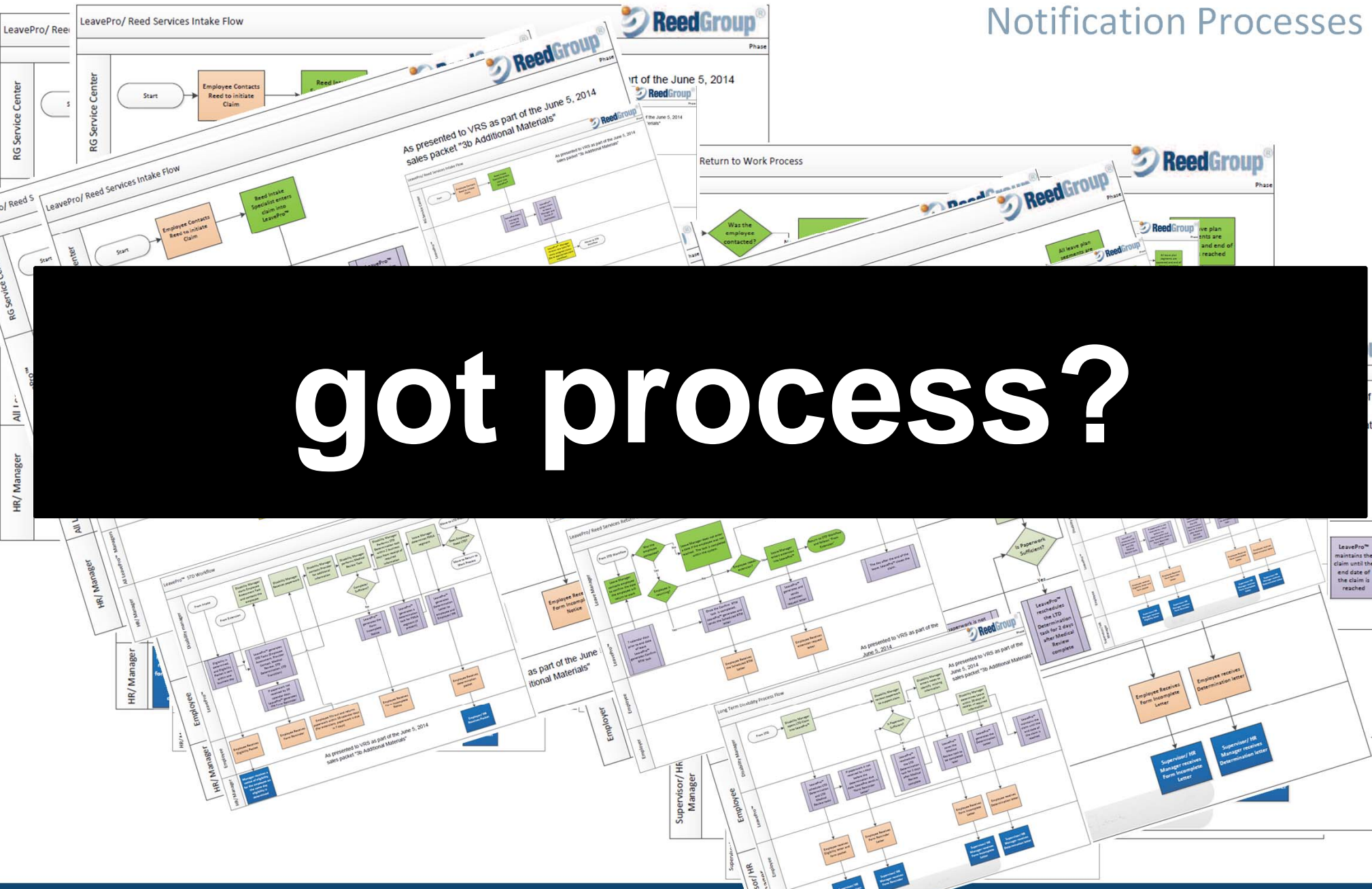
Different Self-Service Portal

Please visit www.reedgroup.com/vsdp-claims to access the portal.

- Training, upcoming events
- Run reports (ad hoc, automatic, recurring reports)
- Requesting a Leave for your employees
- Check on disability claims for your employees
- Check that medical records have been received
- Confirm a return to work date
- And request a change to an existing disability claim

Notification Processes

got processes?

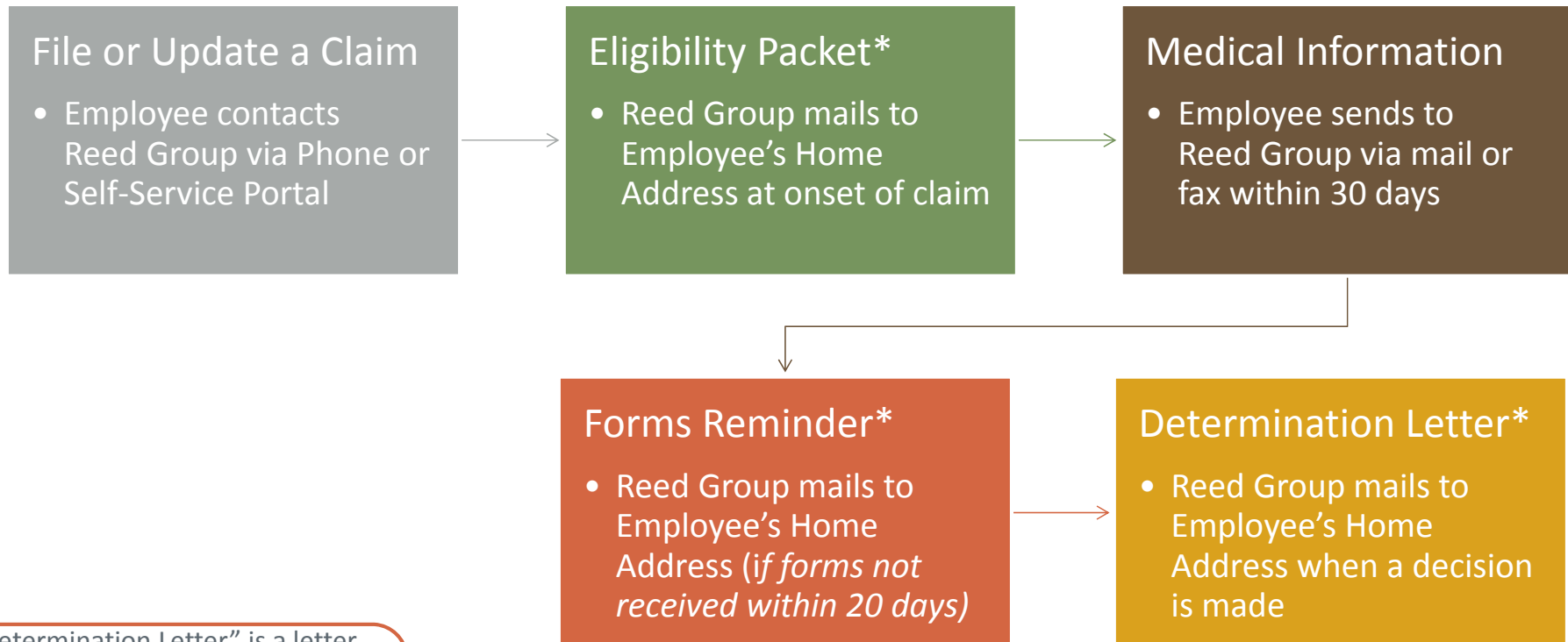


We're going to talk about

processes

that **impact you and your employees...**

Short-Term Disability Process



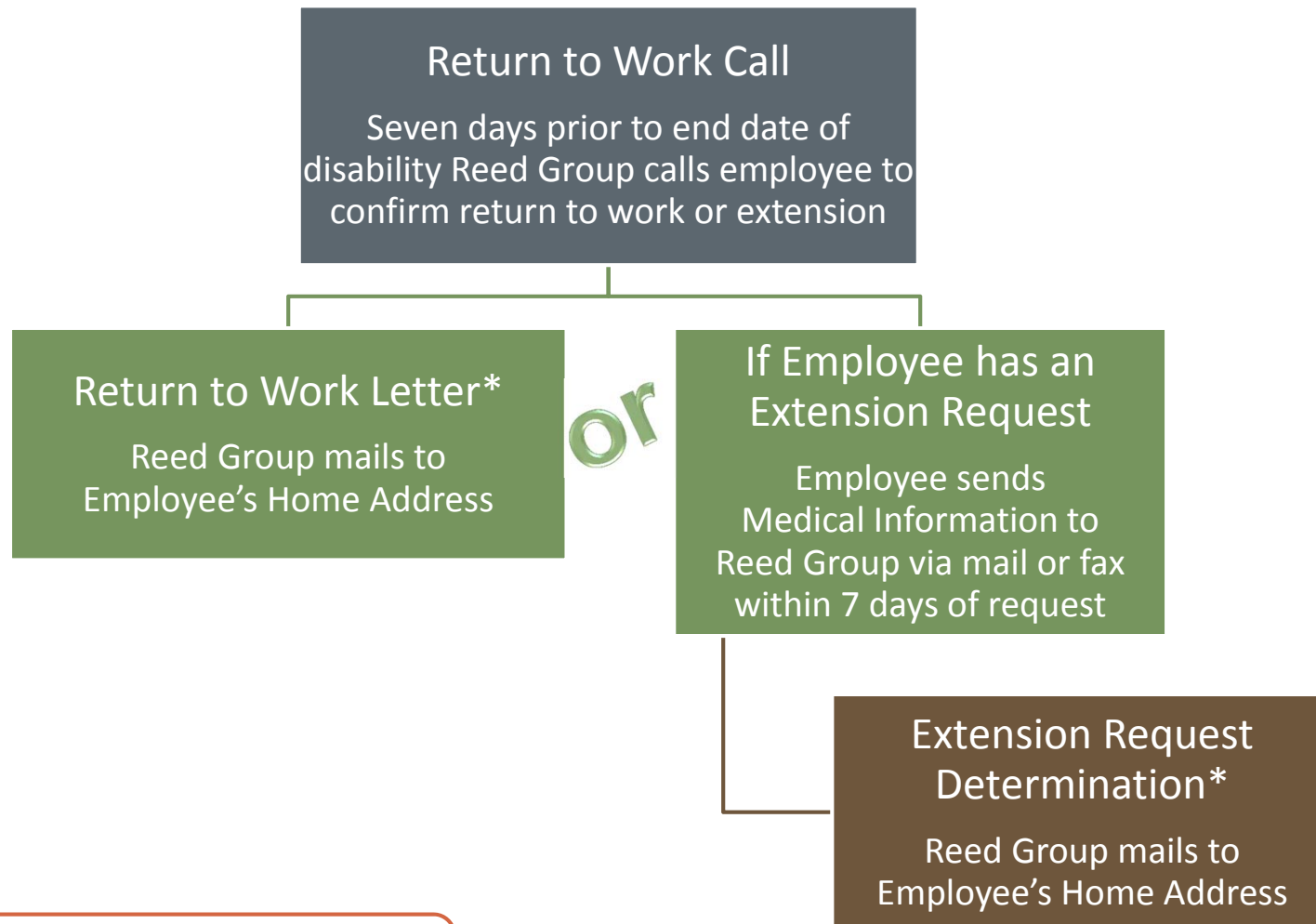
"Determination Letter" is a letter from Reed Group approving or denying the claim. If the claim is denied, the letter will include information about the appeal process

Examples of Forms Requested:

- Attending Physician Statement
- Authorization for Release of Medical Information

*notice also sent to Employer's work email address

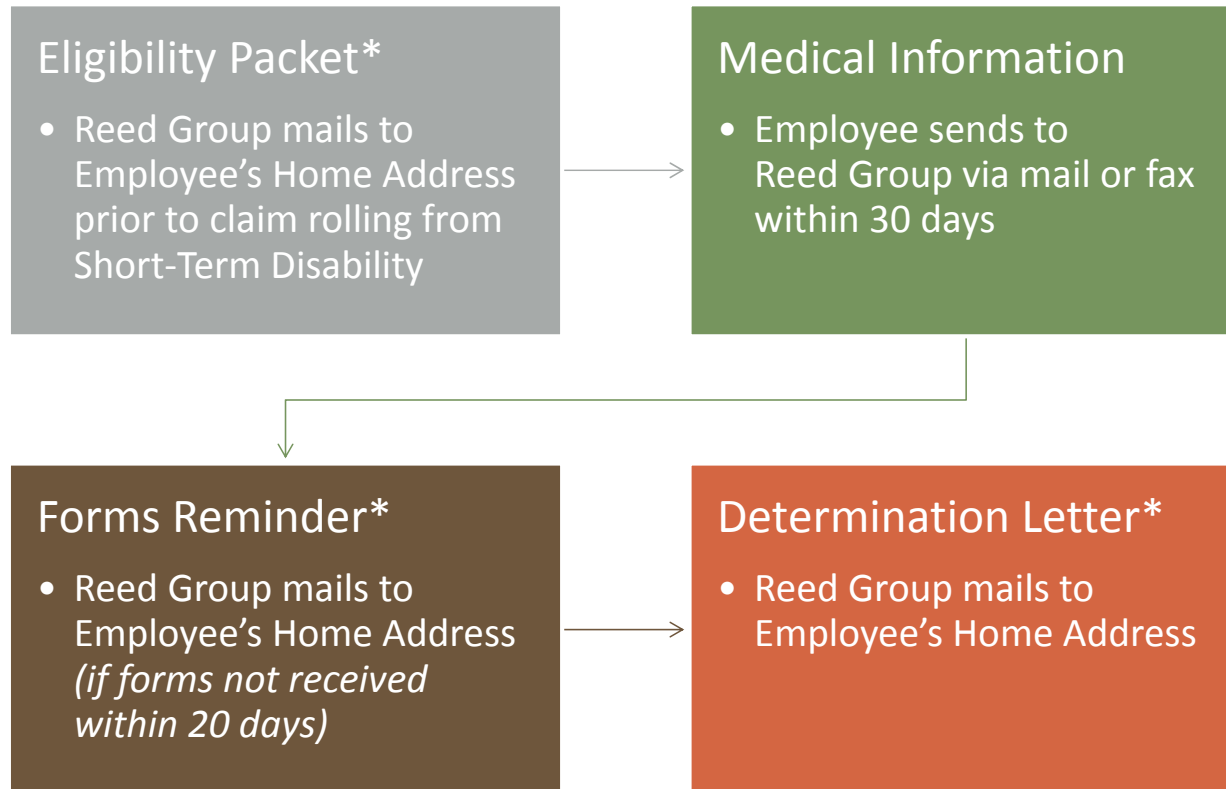
Return to Work Process



An Extension may be requested at any time including after leave approval and does not need to wait for the Return to Work Call

*notice also sent to Employer's work email address

Long-Term Disability Process

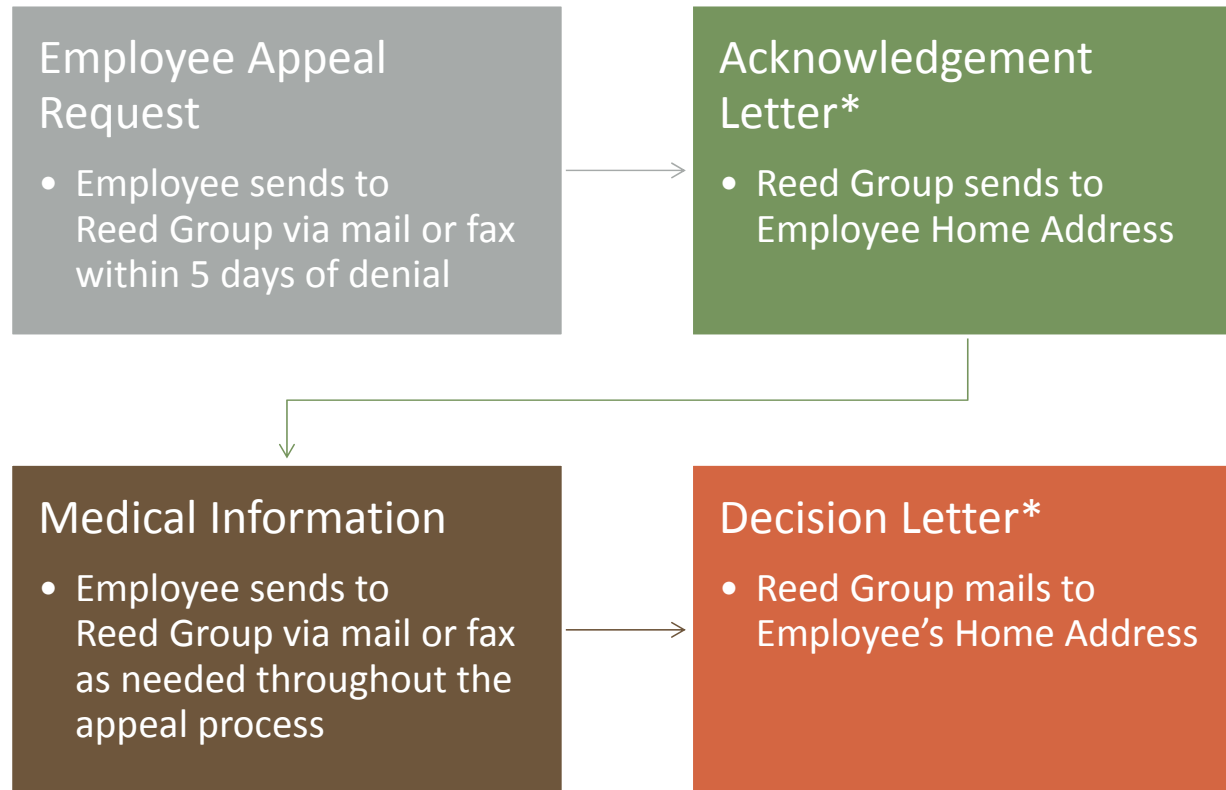


Examples of Forms Requested:

- Long-Term Disability Repayment Agreement
- Request for Health Insurance Credit (VRS-45)
- W-4 Form

*notice also sent to Employer's work email address

Appeals Process



The Determination Letter that was sent when claim was denied includes information about the appeal process

*notice also sent to Employer's work email address

What Stays The Same?

Reed Group provides services as documented in the Virginia Sickness and Disability Program Handbook for State Employees:

- Scope of Reed Group Services
- Coordination with Other Benefits
- Non-clinical claims Information Employers are Allowed to See

Scope of Reed Group Services

New and Updated Short-Term Disability Claims

Income replacement levels

Return to work determination

Catastrophic condition

Major chronic condition

Transition to Long-Term Disability

Work-related and non-work-related disabilities

Coordination with Other Benefits

Workers' Compensation

Social Security Disability Insurance

Outside income or other benefits for the same disability

VSDP Long-Term Care*

*indirectly via a report sent to VRS

Non-Clinical Claim Information Employers are Authorized to See

The date the employee initiated a disability claim

Whether the employee's claim is for Short-Term Disability, Long-Term Disability or a catastrophic or major chronic condition

Authorized start and end dates of the disability period

Dates to begin paying the employee at 100 percent, 80 percent or 60 percent of pre-disability income

Estimated return to work date

Physical restrictions

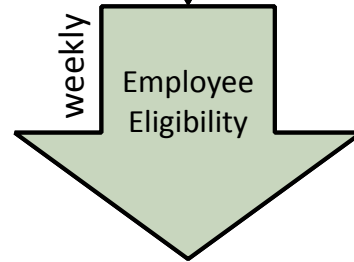
Number of hours a day your employee is able to work

When a case is closed



Virginia Retirement System

Information Exchange and Technology



A

Initial Employee eligibility information sent from VRS Navigator to Reed Group

Employee provides to Agency and Agency provides to VRS Navigator: Employee home address of **123 Maple Lane**

Both VRS Navigator and Reed Group have Employee home address of: **123 Maple Lane**

B

Employee information updated directly in Reed Group systems overrides "A"

Employee provides to Reed Group upon Short-Term Disability intake: Employee home address of **456 Ash Street**

VRS Navigator has address of **123 Maple Lane** and Reed Group has address of **456 Ash Street**

C

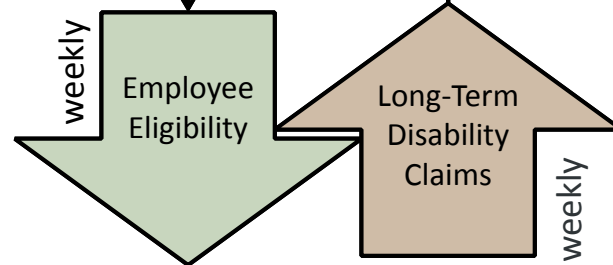
New VRS Navigator information overrides "B"

Employee provides to Agency and Agency provides to VRS Navigator: Employee home address of **789 Oak Circle**

VRS Navigator has address of **789 Oak Circle** and Reed Group has address of **789 Oak Circle**



Virginia Retirement System



email

LeavePro™

Employer Notifications

- Eligibility
- Medical Information Request
- Forms Reminder
- Determination
- Return to work Date
- Extension Request
- Extension Request Determination

Reports

- You may request an email alert when either an Ad-Hoc or subscription report is available

Employer Reports

- Ad-Hoc, Scheduled, Recurring
 - Parameters: Dates, Reason, Location
- Excel, CSV, PDF

Disability Claims

- Search for an employee
- View employee information
- View and print non-clinical claim information
- Create new leave request
- Change dates of leave request
- Cancel leave request

VSDP Claims Home Page

Employers and employees access to a Claims Home Page specifically designed for VSDP:

www.reedgroup.com/vsdp-claims

- News
- Upcoming events
- Employer Tools:
 - Training Guide for Employers
 - Quick Reference Card (QRC)
 - Reference Manual
 - Employee Toolkit
 - Access Request Forms
- Employee Tools:
 - Training Guide for Employees
 - Member Wallet Cards
- Self-Service Portal

ReedGroup® 800 347 7443 Q Search

Customers Products We Solve About Us Career Opportunities Contact Us Blog

Welcome VSDP Members! Log into [LeavePro™ Self Service Portal](#) to file or check on a claim, run reports, confirm a return-to-work date, check on medical records receipt and more!

This is your portal for Virginia Sickness and Disability Program Disability Claims Administration

News: Training Materials:

Short-Term Disability and Long-Term Disability management has changed from Unum to Reed Group as of May 1, 2015. Employees: [Employee Quick Reference](#)
[Employee Guide to Using LeavePro™ PDF](#)
[Employee Guide to Using LeavePro™ Online](#)
[Read more](#)

Download Forms: Employers: [Employer Quick Reference](#)
[Employer Guide to Using LeavePro™ PDF](#)
[Employer Guide to Using LeavePro™ Online](#)
[Member Wallet Card](#)
[Employer Communication Toolkit](#)
[A](#)
[B](#)
[C](#)

LeavePro™ Demonstration

Accessing LeavePro™

- Register as a new user in LeavePro™
- Log In to LeavePro™
- Change your Password

LeavePro™ for Employers

- Search for an employee
- View employee information
- View and print claim information
- Create new leave request
- Change dates of leave request
- Cancel leave request

Running Reports

- Run Ad-Hoc reports (on demand)
- Run Report Subscriptions (recurring reports)
- Set report parameters
- Choose a report file format: Excel, CSV, PDF

Employer Reports

- Open Leave Inventory Report
- Closed Leave Report
- Estimated RTW Report
- Intermittent Leave Certification Report
- Leave Status and Time Used Report
- New Leaves Received Report
- Notification & Changes Summary Report
- Notification & Changes Detail Report
- Exhausted Denied Report

Note: LeavePro™ works the same for employees, Except of course your employees see only their information

Who Does What > Roles of Service Teams

Reed Group

- **Account Management**
 - Three Reed Group Account Coordinators are based in Virginia to partner with you, providing increased personalized attention to employer requests.
 - Escalations, LeavePro™ Self-Service Portal, Training, Reports and Access Requests
- **Service Center**
 - **Disability Claims Processing**
 - **Nurse Case Managers**

VRS Customer Contact Center

- Questions about disability plan rules
- Additionally provides answers about pension plans and other benefits

Education & Outreach Services

- For employers
- What Reed Group looks like to employees
- Talking points for employees
- Email template for employees
- Access requests

Education & Outreach Services for Employers

Three Reed Group Account Coordinators are based in Virginia with responsibility for providing High-Touch Services for Employers.

Our job is to serve you, so you can best serve your employees.



During the first quarter of transition, we are providing the following specialized services to help your organization implement effective change:

- Online meetings to provide answers to questions as they arises
 - WebEx calls each Tues morning and Thurs afternoon starting May 5
- On-site visit to focus on special needs of your agency
 - Reach out to employers who did not attend training – (in person or WebEx training by region)
 - On-going in-person training and support as needed
 - Participation in on-going employer roundtable sessions

Toolkit: What Reed Group looks like to employees

Wallet Card



No action needs to be taken by employees

Put simply....

The phone number and website are changing

Toolkit: Employer Post-Training Emails

You will be receiving three emails in the upcoming days:

1. Welcome email

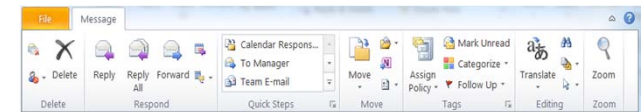
- Email template for communicating with your employees
- Account Coordinators
- Handbooks & Wallet Cards
- Website & Links

2. Invitation to attend May web conferences

- You will receive a calendar invitation from our Account Coordinators

3. LeavePro™ Access

- You will receive an automatically generated email from our LeavePro™ with your user id and temporary password



To: <training.attendees>
From: vdpsupport@reedgroup.com
Date: <to be sent the end of day of training>
Subj: Welcome to Reed Group!

Dear VSDP Employer Training Participant:

On behalf of Reed Group and the entire training team, please allow me to extend a warm thank you for attending the VSDP Reed Group Employer Training session. We hope that you found the training informative and worthwhile.

Communicating with your Employees

Copy/paste this email template and send to your employee distribution lists:

To: <employee distribution group>
From: <Agency HR>
Date: <to be sent the last week of April>
Subj: Changes to Disability Claims Processing

We are pleased to announce that management of disability claims changes from Unum to Reed Group on May 1, 2015.

Even though a change is ahead, all plan benefits remain the same.

Benefits of transitioning to Reed Group include:

- Clinical expertise that provides better care for you while on disability
- Improved service, processing and website for managing your disability claims

Important Facts:

- The Reed Group Service Center begins taking calls on **May 1** for new Short-Term Disability claims **effective May 1 or after**
- Employees on Short-Term Disability prior to **May 1** stay with Unum
- Please visit www.reedgroup.com/vsdp-claims for general information and wallet cards
- The updated VSDP Employee Handbook can be found at www.varetire.org/pdf/publications/vsdp-handbook.pdf

If you have questions about the change, please contact the VRS Service Center at 1-888-827-3847.

May 2015						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Toolkit: Answers to Employee Questions

**Even though a change is ahead,
all plan benefits remain the same**

What is the benefit to employees?

- **Clinical expertise** that provides better care while on disability
- **Improved service**, processing and website for managing disability claims

What is changing?

- **Phone number and website** for filing disability claims
- **No action** needs to be taken by other employees

• On **May 1** and after:

- Contact **Reed Group** Service Center for Short Term Disability claims with a Date of Disability **May 1** and after and all Long-Term Disability claims: 877-928-7021
- Contact **Unum** for Short Term Disability claims with a Date of Disability prior to **May 1**: 1-800-652-5602

Who to Call

- Call your employer for questions about the transition

**Call the VRS Customer Contact Center at
888-VARETIR (888-827-3847)**

Toolkit: Email Template for communicating with employees

To: <employee distribution group>
From: <Agency HR>
Date: <to be sent the last week of April>
Subj: Changes to Disability Claims Processing

We are pleased to announce that management of disability claims changes from Unum to Reed Group on May 1, 2015.

Even though a change is ahead, all plan benefits remain the same.

Benefits of transitioning to Reed Group include:

- Clinical expertise that provides better care for you while on disability
- Improved service, processing and website for managing your disability claims

Important Facts:

- The Reed Group Service Center begins taking calls on **May 1** for new Short-Term Disability claims effective May 1 or after
- Employees on Short-Term Disability prior to **May 1** stay with Unum
- Please visit www.reedgroup.com/vsdp-claims for general information and wallet cards
- The updated VSDP Employee Handbook can be found at
- www.varetire.org/pdf/publications/vsdp-handbook.pdf

If you have questions about the change, please contact the **VRS Customer Contact Center at 1-888-827-3847**.

Note:

Reed Group sends welcome letters to LTD participants

Unum has already notified current STD participants

Toolkit: LeavePro™ Access Request Form

You may need to complete an Access Request form if:

- LeavePro™ Registration doesn't work
- Changes in responsibilities (who should / should not access employee non-clinical claims information)
- Current UNUM access is not correct
 - LeavePro™
 - Notifications
 - Daily Action Report
 - Peer/Business Partner

IMPORTANT! Access is dependent on how your Agency's data is set up in VRS Navigator. Contact Reed Group Account Coordinators for Agency-specific information.

Form can be found at:

www.reedgroup.com/vsdp-claims

LeavePro™ Employer Access Request Form

Agency Name _____ Agency Code _____

Access Request: (complete the information below for the person who will get access)	
Name: _____	ADD: <input type="checkbox"/> LeavePro™
Title: _____	<input type="checkbox"/> Notifications
Email: _____	<input type="checkbox"/> Daily Action Report
Phone Number: _____	<input type="checkbox"/> Peer/Business Partner
VRS CUSTOMER ID: _____	_____ Manage for Me
I Manage for: _____	
Access Termination: (complete the information below for the person whose access will be removed)	
Name: _____	REMOVE: <input type="checkbox"/> LeavePro™
Title: _____	<input type="checkbox"/> Notifications
Email: _____	<input type="checkbox"/> Daily Action Report
Phone Number: _____	<input type="checkbox"/> Peer/Business Partner
VRS CUSTOMER ID: _____	_____ Manage for Me
I Manage for: _____	

Use next page for more requests

Security Administrator Name (please print) _____ Title _____

Security Administrator Signature _____ Date _____

Send Completed Form (including approval signatures and page 2 if used) to Email:
 vdpsupport@reedgroup.com

*If you are unable to send an approved form with signatures via email,
 a forwarded email with approval from the Security Administrator is acceptable*

Or mail completed form to:
 P.O. Box 6248
 Broomfield, CO 80021

For Reed Group's Use Only	
VRS Approval _____	
<input type="checkbox"/> Approved <input type="checkbox"/> Not Approved Reason: _____	
Other Notes _____	

PAGE 1
 CONFIDENTIAL © 2015 Reed Group, Ltd., a wholly-owned subsidiary of the Guardian Life Insurance Company of America.
 All Rights Reserved.

Toolkit: Contact Information

Disability Plan Rules	Claims Processing	For Employers Only: Escalations, LeavePro™ Self-Service Portal, Training, Reports and Access Requests
<p>VRS Customer Care Center</p> <p>888-varetire 888-827-3847</p> <p>www.varetire.org/VSDP-ER</p>	<p>Reed Group Service Center</p> <p>877-928-7021</p> <p>P.O. Box 6248 Broomfield, CO 80021</p> <p>www.reedgroup.com/vsdp-claims</p> <p>Fax: 720-456-4784</p>	<p>Reed Group Account Coordinators</p> <p>VDPsupport@reedgroup.com</p> <p>844-507-5391</p>

Who Do I Call If....

I need to know if my employee on short-term can use sick leave

- This is a Disability Plan Rule, call the VRS Customer Contact Center

I don't understand when my employee will return to work

- Look in your email for Return to Work Notifications, or Log into the Self-Service Portal. If you still can't find it, call the Reed Group Service Center

My employees accrue annual leave while on short-term disability

- This is a Disability Plan Rule, call the VRS Customer Contact Center

The DAR report does not have the correct pre-disability income percentage for any of my employees

- This is an Escalation, email or call the Reed Group Account Coordinators

I would like on-site training for my staff to help improve claims processing procedures

- This is a Training Request, email or call the Reed Group Account Coordinators

Common Questions and Answers

What is new and what is changing with the May 1st transition to Reed Group?

- Reed Group will be the new disability TPA providing improved on-site training and support services and a clinical model for disability absence management that provides medically appropriate return to work. Includes LTD takeover. STD Apr 30 and prior stays with Unum.

What is the impact of May 1st transition to Reed Group for employees?

- There is a new portal, new phone number, new mailing address, new service center.

What is the notification processes for employers and employees?

- Employers get email notifications when employees are contacted for Eligibility, Medical Information Requests, Forms Reminders, Determinations, return to work Date, Extension Requests, Extension Request Determinations. Employees are notified via USPS mail to their home address,

What are the roles of the VRS Customer Contact Center & the Reed Group Account Coordinators and Service Center?

- VRS Customer Contact Center – disability plan rules; Reed Group Service Center - Claims Processing; Reed Group Account Coordinators - Access Requests, Training, and Escalations

How is information is exchanged between VRS and Reed Group?

- Eligibility file to Reed Group weekly; LTD information to VRS weekly

Common Questions and Answers

How is email used for distribution of the DAR report?

- Designated contacts will receive the DAR based on how they request it in LeavePro™
- It is one report with all employees on it.

How does LeavePro™ help employers and employees track claims?

- I can run reports (ad hoc and scheduled) and look up dates and type of disability & estimated return to work dates for all employees; each employee has access to their own disability information.

How do I use the Employee Communication Toolkit to communicate with employees about the May 1st transition to Reed Group?

- I will email forward the information to all of employees prior to May 1; determine how I want to distribute wallet cards; and familiarize myself with the FAQs to help answer questions.

Who do to contact if I have questions?

- VRS Customer Contact Center 888-827-3847

Thank you
Training Surveys
Quick Reference Card

NaTasha Grimes – Virginia-based Lead Account Coordinator

NaTasha Grimes is your dedicated **lead account coordinator** responsible for leading a team of account coordinators to ensure employers and employees are well-informed, trained, supported, and have a feedback loop regarding the managed disability plans administered by Reed Group.

NaTasha taught in the Virginia public school system for over 10 years. She holds her life and health insurance licensure for both Virginia and North Carolina. Prior to joining the account management team at Reed Group, NaTasha was a top performing independent agent representing Aflac where she conducted business-to-business sales and helped CEOs, business owners, and HR managers determine which benefit programs best suited their employees.

She holds a BS in Education from Longwood University and is pursuing her Master's degree in HR Training and Development.

Tameka Powell – Virginia-based Account Coordinator

Tameka Powell is your dedicated **account coordinator** responsible for ensuring employers and employees are well-informed, trained, supported, and have a feedback loop regarding the managed disability plans administered by Reed Group.

Tameka has experience in managing client relationships, evolving and implementing process improvements, as well as developing and conducting employee training. Prior to becoming an Account Coordinator with Reed Group, Tameka worked within Human Resources for several local staffing firms in the Richmond, Virginia area. She was responsible for all customer/employee relations, benefits, and hiring processes for several Fortune 500 companies.

She holds a BS in Human Resources from Virginia Commonwealth University, and recently received her MBA in Healthcare Management from Liberty University.

Curt is your dedicated **account executive**. He is responsible for developing and maintaining relationships with all account constituents, both internal and external. Curt's role is to ensure solid client relations, address client concerns, answers questions, seek resolution with issues and act as a liaison between the client and internal Reed Group resources.

Curt has over 20 years of experience in the medical field and has held positions at all administrative levels, including C-Level positions. He has worked with local and state government agencies and has extensive customer service experience. He has been a team leader for most of his professional career. For the last year, Curt has been the dedicated Account Executive for one of Reed Group's largest clients.

Curt received his undergraduate in Kinesiology from the University of Colorado and his Masters of Business Management from Regis University.

Margaret is your dedicated **program manager** through the Reed Group implementation. She is responsible for achieving the business objectives and timely completion of the project. She engages the cross-functional project team and is the primary point of contact for the steering committee, stakeholders, and project team escalations.

Margaret has extensive experience in leading teams, championing new client, product, program, and system implementations, conducting business analysis, and advocating change management. Prior to joining the Solutions Delivery team at Reed Group, Margaret was responsible for program management at several Fortune 500 companies. Margaret was the IT Director at AT&T, responsible for all HR/Payroll systems and has extensive experience working with vendors on benefit admin integration.

She holds a BS in Computer Management Science from Metropolitan State University of Denver.