



PROCESS GUIDE

# Easy absence claim filing

Claim intake

Medical certification

Returning to work

Resources

Confirming  
returnUnconfirmed  
returnExtension  
needed

## Filing a claim

24/7/365 access



877-202-0055



[matrixabsence.com](https://matrixabsence.com)



Matrix platform  
mobile app



### EMPLOYEES

- Contact the Reliance Matrix Intake Center at the time of an unplanned absence or up to 30 days prior to a planned absence.
- We're available by phone, online or via the mobile app 24/7/365 to fit your schedule.
- An average filing takes just 6-9 minutes, with our client-customized intake survey process.
- Use "Ask Rita" for support with an online filing. Our trained staff can also help with bilingual, TTY and language line support by phone.



### RELIANCE MATRIX

- Whichever way you file, our customized intake is based upon line of coverage and features client-specific questions and reminders.
- We create an employee Intake Packet, available via USPS mail or the Matrix Platform.
- Connect with your Absence Management Specialist (AMS) via phone, text, email or USPS mail.
- Also access your claim status and details through the mobile app or [MatrixAbsence.com](https://MatrixAbsence.com).



### EMPLOYER/SUPERVISOR

- Human Resources receives a daily email report as each intake is completed—with employee details, important dates and responses to customized questions.
- Direct supervisors receive a status notice update via email.
- AMS connects with designated employee contact, to review claim details and define next steps.

Confirming  
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## Medical certification



### EMPLOYEES

- An Absence Management Specialist (AMS) contacts the employee within 2 business days of filing a claim to confirm medical certification process.
- We send the employee an Eligibility Notification Letter, based on information from the employer, within 2-5 business days.
- The employee gets an eCall when we receive certification. If we don't receive it within 10 business days, we'll contact the employee to reach out to their provider.
- We'll notify the employee when their claim has been approved or denied.



### RELIANCE MATRIX

- Within 1 day of claim intake, we reach out to the provider for medical certification—up to 3 times within 10 business days.
- 100% of complex-rated claims are reviewed by a Nurse Case Manager or Behavioral Health Specialist.
- We complete an eligibility review within 2-5 business days of claim intake.
- Once we get medical certification, the AMS approves or denies the claim within 3 business days.



### EMPLOYER/SUPERVISOR

- Human Resources gets an email report indicating whether we've received medical certification, 10 days after claim intake.
- Within 1 day of claims decision:
  - Human Resources receives an email notification report.
  - Direct supervisors receive a status notice update via email.

Confirming  
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## Returning to work



### EMPLOYEES

- An Absence Management Specialist (AMS) informs the employer of claim status changes.
- The employee can connect with the AMS via phone, text, email or USPS mail with claim-related questions.
- We'll contact the employee 5 business days before the claim end date, to confirm their return to work.
- If there are restrictions, the employee must provide us with medical documentation.
- The employee follows employer's return-to-work policy.



### RELIANCE MATRIX

- We monitor the claim lifecycle and provide the employer with status change notifications.
- We'll reach out to the employee 5 business days before their return to work, up to 3 times.
- If the employee has unclear restrictions or requests an extension, we will contact the physician to clarify. If the restrictions are clear, we will ask for a copy of the return-to-work note and ask the employer if the restrictions can be accommodated.
- When we confirm the employee has returned to work, we notify the employer and close the claim.

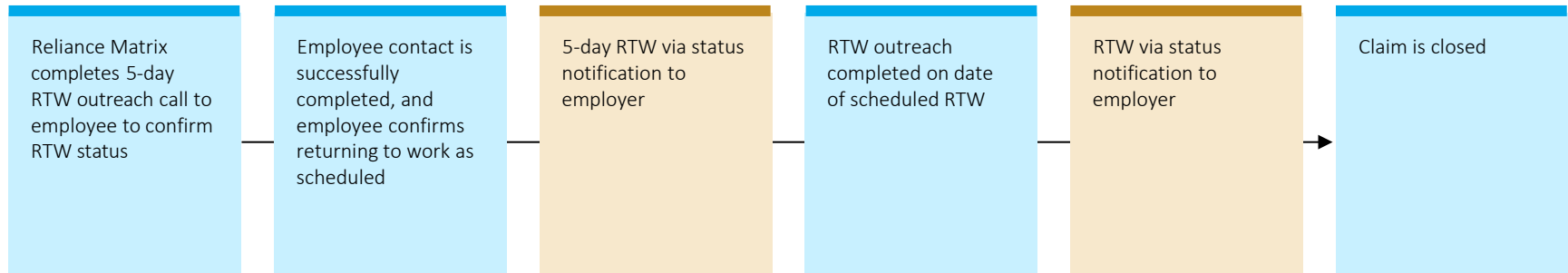


### EMPLOYER/SUPERVISOR

- After we confirm 5 days prior that the employee is returning to work, Human Resources gets an email notification report.
- Once the employee returns to work:
  - Human Resources receives an email notification report.
  - Direct supervisors receive a status notice update via email.
- **If there's an ADA accommodation request, our ADA specialist connects with the designated employer contact to review details and define next steps.**

Confirming  
returnUnconfirmed  
returnExtension  
needed

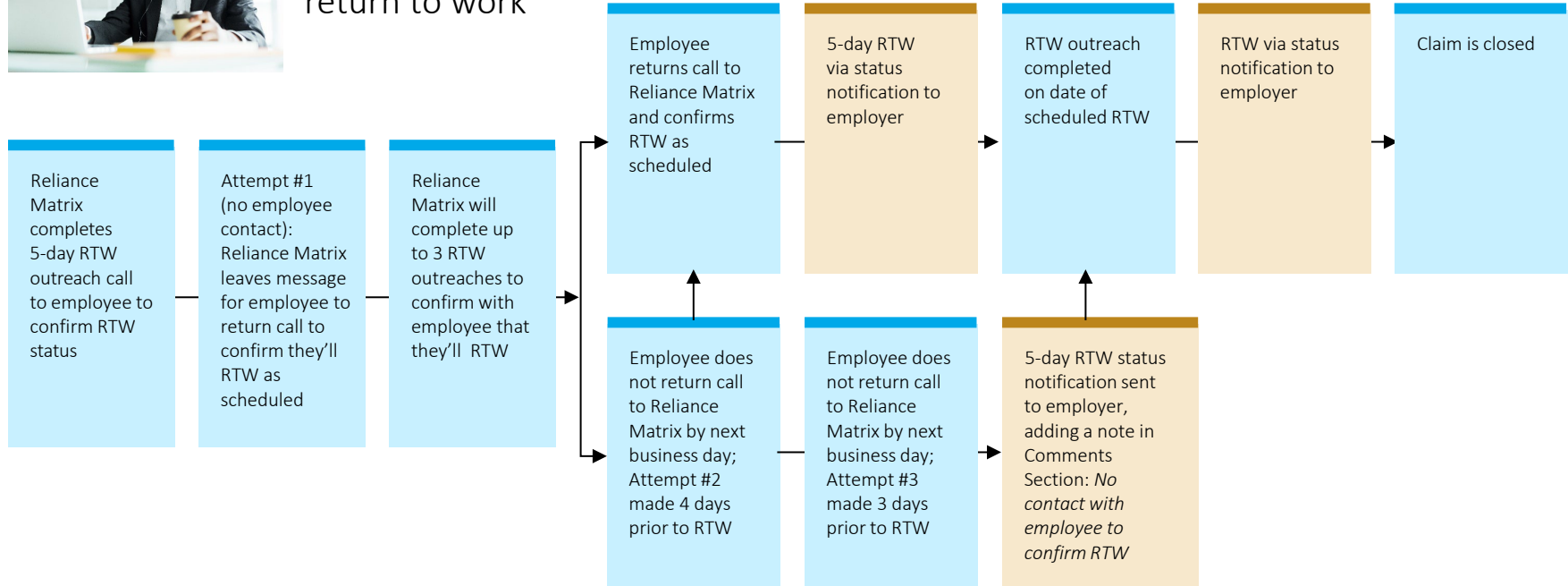
## Confirming a return to work



The Return to Work process is not used on Intermittent claims.

Confirming  
returnUnconfirmed  
returnExtension  
needed

## Unconfirmed return to work



The Return to Work process is not used on Intermittent claims.

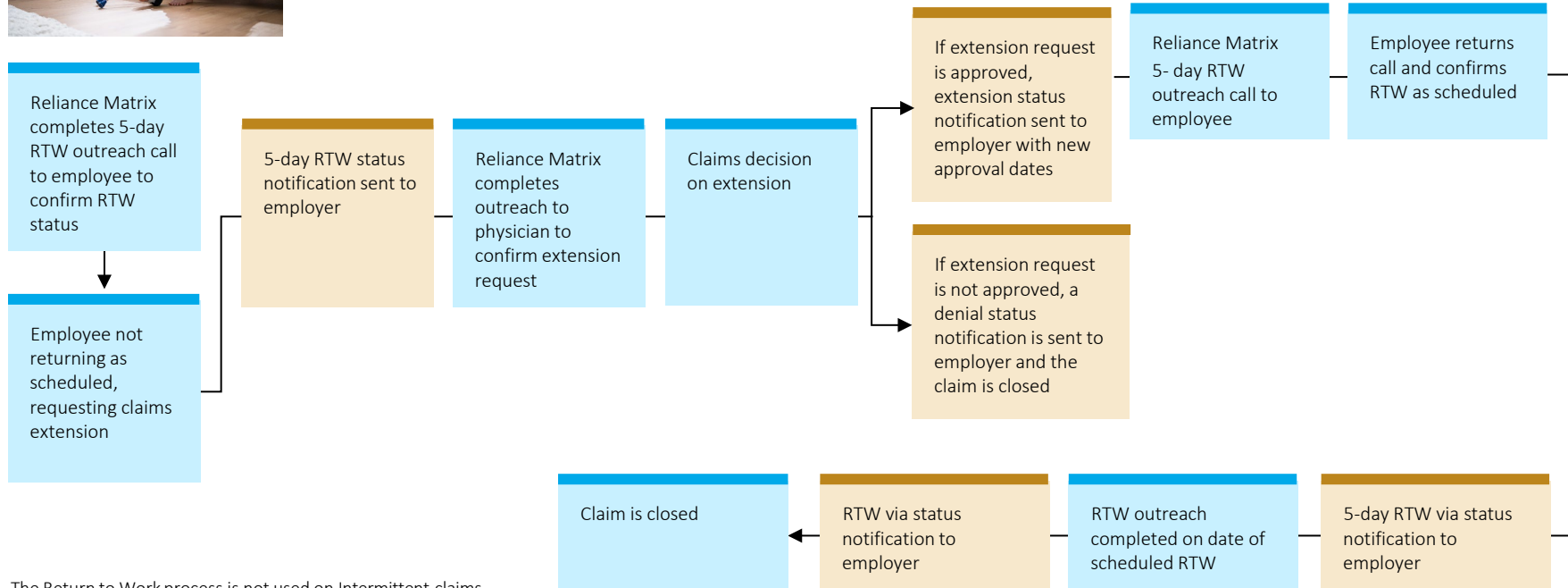
Confirming return

Unconfirmed return

**Extension needed**



## Extension needed



The Return to Work process is not used on Intermittent claims.

Confirming return

Unconfirmed return

Extension needed

# Human Resources report status notification

Claimant details

Claim date details

| Employee Name    | Employee ID | Job Title                                       | Former Absence Type  | Absence Type          | What Changed                          | Leave Policy Details Available | Radar Update | Last Day Worked | Former Start | Start      | Former Benefit Start Date | Benefit Start Date | LTD Benefit Start Date | Former Benefit End Date | Benefit End Date | Former Return to Work                                   | Return to Work (RTW) | Former Status | Status | Former Reason | Reason  |
|------------------|-------------|-------------------------------------------------|----------------------|-----------------------|---------------------------------------|--------------------------------|--------------|-----------------|--------------|------------|---------------------------|--------------------|------------------------|-------------------------|------------------|---------------------------------------------------------|----------------------|---------------|--------|---------------|---------|
| JOHNSON, MARY    | 1222222     | Operator I                                      |                      | Short Term Disability | Benefit Start Date, Benefit End Date  | Y                              |              | 01/10/2023      |              | 01/11/2023 | 01/18/2023                |                    |                        | 01/25/2023              |                  | Estimated 01/30/2023                                    |                      | Approved      |        |               | Omn     |
| WILLIAMS, ROBERT | 1211111     | Senior Software Engineer                        |                      | Paid Family Leave     | Return to Work Date                   | Y                              |              | 01/14/2022      |              | 01/17/2022 |                           | 01/17/2022         |                        |                         | 01/16/2023       | Returned on 01/16/2023 Unable to confirm 05/01/2023 RTW |                      | Approved      |        |               | Bonding |
| JAMES, LINDA     | 1202222     | Manager HR                                      |                      | Paid Family Leave     | Return to Work Date                   | Y                              |              | 07/08/2022      |              | 07/11/2022 |                           | 07/11/2022         |                        |                         | 01/30/2023       | Estimated 02/13/2023                                    |                      | Approved      |        |               | Bonding |
| JONES, ASHLEY    | 1011111     | QC Inspector III                                |                      | Short Term Disability | Return to Work Date                   | Y                              |              | 11/23/2022      |              | 01/03/2023 |                           | 01/03/2023         |                        |                         | 01/23/2023       | Estimated 01/30/2023                                    |                      | Approved      |        |               | Omn     |
| MILLER, JAMES    | 1223333     | Technician 2 Repair & Maintenance               |                      | Short Term Disability | Return to Work Date, Benefit End Date | Y                              |              | 11/28/2022      |              | 11/30/2022 |                           | 12/07/2022         | 12/14/2022             | 01/30/2023              | 01/23/2023       | Estimated 04/24/2023                                    |                      | Approved      |        |               | Omn     |
| DAVIS, KATE      | 1227777     | Quality Assurance Product Support Specialist II |                      | Short Term Disability | New Claim                             | N                              |              | 02/24/2023      |              | 02/27/2023 |                           |                    |                        |                         |                  | Unable to confirm 01/30/2023 RTW                        |                      | Pending       |        |               | Omn     |
| SMITH, CHRIS     | 1211111     | Quality Engineer I                              |                      | Leave Of Absence      | Return to Work Date                   | Y                              |              | 08/22/2022      |              | 08/28/2022 |                           |                    |                        |                         |                  | Confirmed Returning on 01/30/2023                       |                      | Approved      |        |               | Newborn |
| GARCIA, ANTHONY  | 1211111     | Operator I Forklift                             |                      | Short Term Disability | Return to Work Date                   | Y                              |              | 12/22/2022      |              | 12/22/2022 |                           | 12/22/2022         |                        |                         | 01/20/2023       | Returned on 12/27/2022                                  |                      | Approved      |        |               | Omn     |
| ANDERSON, EMMA   | 1166666     | Sr. Supervisor Document Control                 | Long Term Disability | Short Term Disability | Status, Absence Type                  | Y                              |              | 11/25/2022      |              | 11/28/2022 |                           | 11/28/2022         |                        |                         | 12/27/2022       |                                                         | Pending              | Approved      |        |               | Omn     |

Certification status

Department/location details

Restrictions detail

Claimant supervisor and examiner contacts

| Certification Status | Certification Received Date | Workers' Comp Y/N | Dept or Location | Work State | Exempt | Supervisor Email         | Restriction Type | Former Restriction | Restriction Description | Actual Modified Work Start | Expected Modified Work End | Claims Examiner Email  | New Claim | (A) Work State | Location(E) | Department(C) | Division(D) | Ledger(E)  | Company Code(F) |
|----------------------|-----------------------------|-------------------|------------------|------------|--------|--------------------------|------------------|--------------------|-------------------------|----------------------------|----------------------------|------------------------|-----------|----------------|-------------|---------------|-------------|------------|-----------------|
| Med Received         | 01/19/2023                  | N                 | S4508            | HN         | N      |                          |                  |                    |                         |                            |                            | Elizabeth@matricos.com | N         | HN             | S4508       | 10004         | EMD         | 2005       | 3205            |
| Med Received         | 01/08/2022                  | N                 | S4496            | CA         | Y      | stave.smth@Sample Co.com |                  |                    |                         |                            |                            | Elizabeth@matricos.com | N         | CA             | S4496       | 900116        | CFR         | 2005       | 3205            |
| Not Received         |                             | N                 | S0273            | IL         | Y      | stave.smth@Sample Co.com |                  |                    |                         |                            |                            | Elizabeth@matricos.com | N         | IL             | S0273-APHC  | 0394          | CRS         | CHHR       | 1003            |
| Med Received         | 01/20/2023                  | N                 | S1804            | CA         | N      | stave.smth@Sample Co.com |                  |                    |                         |                            |                            | Elizabeth@matricos.com | N         | CA             | S1804-GTB   | AVKY          | SSK         | VC01       | 1030            |
| Not Received         |                             | N                 | S0850            | CA         | N      | stave.smth@Sample Co.com |                  |                    |                         |                            |                            | Elizabeth@matricos.com | N         | CA             | S0850-PF    | 341001        | PRD         | NP34       | 1003            |
| Not Received         |                             | N                 | S0613            | IL         | Y      | stave.smth@Sample Co.com |                  |                    |                         |                            |                            | Elizabeth@matricos.com | Y         | IL             | S0613-LF349 | 500           | IBNR        | U001017906 | 2010            |
| Med Received         | 01/06/2023                  | N                 | S4509            | HN         | Y      | stave.smth@Sample Co.com |                  |                    |                         |                            |                            | Elizabeth@matricos.com | N         | HN             | S4509-PH    | 100159        | EMD         | 2005       | 3205            |
| Med Received         | 01/12/2023                  | N                 | S3383            | OH         | N      | stave.smth@Sample Co.com |                  |                    |                         |                            |                            | Elizabeth@matricos.com | N         | OH             | S3383-TOLP  | 102526        | CFR         | RP10       | 1003            |
| Not Received         |                             | N                 | S4661            | CA         | Y      | stave.smth@Sample Co.com | Physical         | Work From Home     |                         | 01/03/2023                 | 02/01/2023                 | Elizabeth@matricos.com | N         | CA             | S4661       | 660           | DOK         | U008617908 | 2086            |



Confirming  
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## Absence calendar

The Human Resources client team and Managers/Supervisors can have access to the Absence calendar.

Managers/Supervisors will receive access to the absence calendar once they have an employee out on leave. This coincides with them receiving the email to set up their user account.

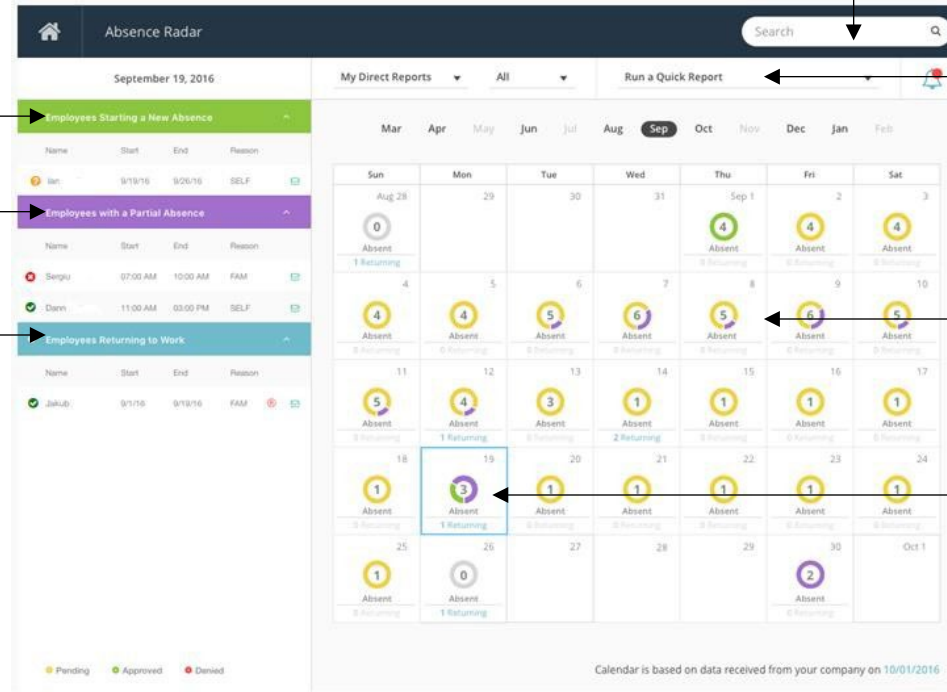
Managers/Supervisors and Human Resources have to be provided on the Eligibility File.

New absences

Partial absences

Return to work reminders

Find a specific employee




Run reports

New claims filed, current leaves and return to work claimants by day

Know when employees are due to return

Confirming  
returnUnconfirmed  
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## Sample communication materials

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### How to File a Leave of Absence or Disability Claim

**Simple, easy, convenient: Starting your absence from work**

To improve your claims experience, your employer has contracted with Reliance Matrix to administer its Short Term Disability (STD), Long Term Disability (LTD) and Family Medical Leave Act (FMLA). This document explains how to file a request for a disability or leave of absence claim.

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**Disability benefits**

Disability programs provide partial pay benefits as financial assistance during an absence from work due to your own medical condition. Your eligibility for such benefits and the amount of pay available vary with each plan. When you apply for disability benefits we will apply the rules of your employer's plan to determine your eligibility and the amount of benefits, if any.

**Leave of absence**

In addition to disability benefits, you may qualify for a leave of absence for the following reasons:

- Your own serious health condition
- Care of a family member
- Needs due to a family member's military service
- Bonding with a newborn, adopted child, or a newly placed foster child
- Other leaves provided by company policy or state or federal law


If you are requesting one of these leaves of absence, we will provide you with a certification form that must be completed to support your leave request. If the leave is medical related, we will send the appropriate form to you or your family member's health care provider as a courtesy. It remains your responsibility to ensure we receive the completed form, so please be in touch with your provider.

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**Information you'll need to report a disability or leave of absence**

Depending on the type of benefits or leave, you will be asked to provide some basic information. Having the following information readily available when you report your absence to Reliance Matrix will speed up the process:


- Personal Information:** Name, address, telephone number, and the last four digits of your Social Security Number
- Job Information:** Job title, job description, workplace location and address, work schedule, supervisor's name and telephone number, date of hire, and last day worked
- Illness/Injury Information:** Nature of the illness, how, when, and, if applicable, where the injury occurred and the date your disability began
- Provider Information:** Name, address, telephone number, and fax number for each treating health care provider

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### How to File a Short Term Disability or FMLA Claim

When caring for yourself or a loved one takes you away from work, you may need to file a Short Term Disability or FMLA claim. We make it easy for you to file 24 hours a day, 7 days a week.


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Scan the QR code to download the eServices mobile app.



Visit [matrixabsence.com](http://matrixabsence.com) to file online.



Call (877) 202-0055 to file your claim by phone.

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For more information, visit [reliancematrix.com](http://reliancematrix.com).

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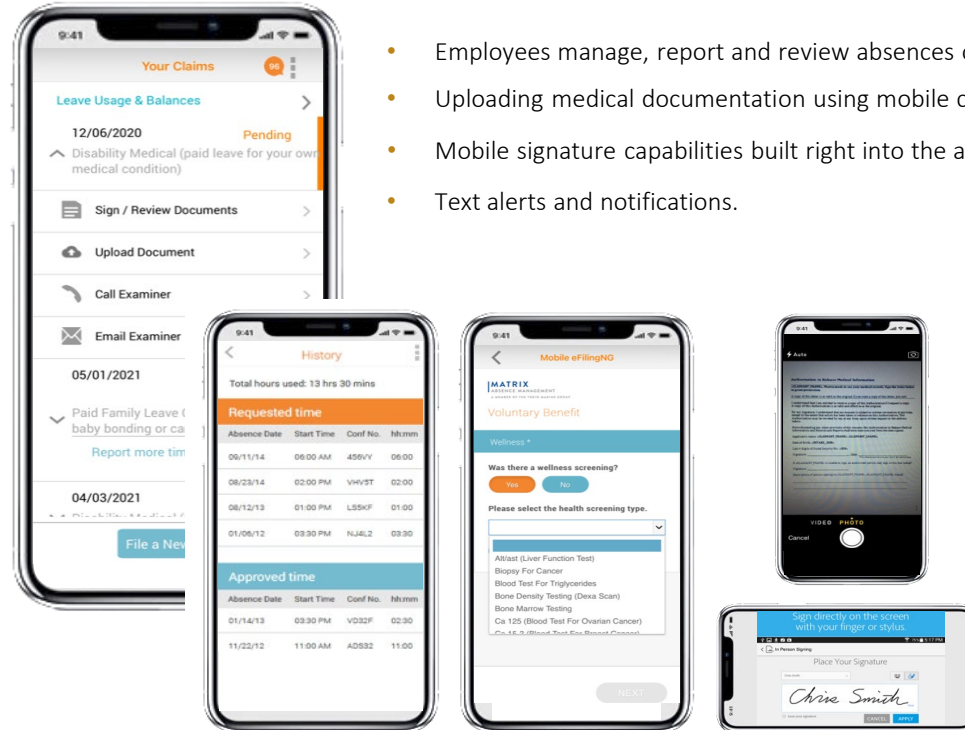
## The entire journey on a mobile device

When employees log in to our mobile app, all demographic information is pre-populated based on the Eligibility File.

Once a date is provided, employees have the option of starting their absence/disability claim or their supplemental health claim.

From there, the entire absence or claim journey can be experienced from our mobile app.

- Employees manage, report and review absences or claims.
- Uploading medical documentation using mobile camera.
- Mobile signature capabilities built right into the app.
- Text alerts and notifications.



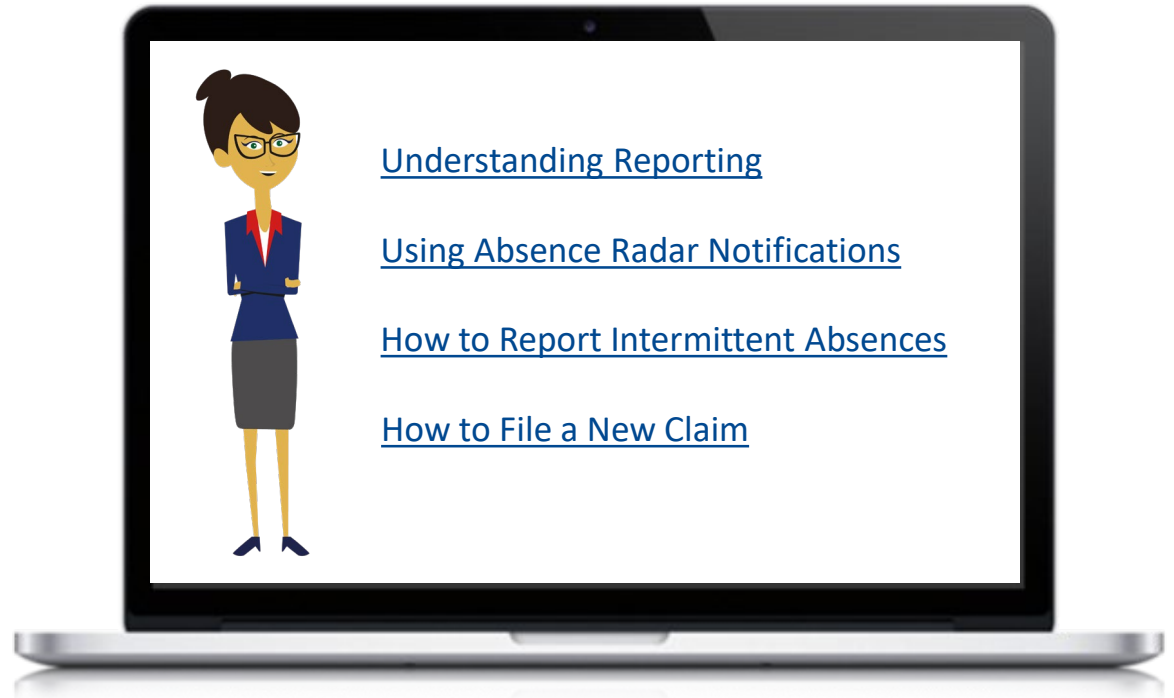
 Access Matrix Mobile™

Understand the process with our online assistant

### “How to” videos for you and employees

Starring Rita, our friendly animated assistant, these videos inform employees about common leaves and absence types and their claim processes.

For employers, Rita helps you understand everything from government programs to online tools and how to use them.



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|--------------|-----------------------|-------------------|--------------------|------------------|-----------|
|              |                       | Confirming return | Unconfirmed return | Extension needed |           |

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