



Leave of Absence Checklist

Whether you're having a baby, attending to personal matters, or need time off for other reasons, ensure a smooth transition before and after your leave by taking these important steps:

- 1 LEARN HOW YOUR LEAVE WILL AFFECT YOUR PAY, BENEFITS, AND EMPLOYMENT** by reviewing the [guide for your type of LOA](#). If you're a parent or becoming a new parent, we have [programs](#) designed just for you. If you are on an Incentive Compensation Plan, check out the Leave of Absence section of the [Incentive Compensation Policies](#).
- 2 DISCUSS YOUR LEAVE PLANS WITH YOUR MANAGER AS FAR IN ADVANCE AS POSSIBLE.** In most cases, you should talk to your manager 30–60 days before you intend to start your leave. This helps your manager assess the business impact of your leave, and ensure your work is covered. During your discussion, give your manager your expected leave start date and return-to-work date.
- 3 INITIATE YOUR LEAVE CLAIM** by calling Matrix Absence Management at 1-855-354-6937 or going to www.matrixabsence.com. Don't forget to read your Matrix Leave of Absence packet! It contains important information and actions for you.
- 4 FIND TIME TO MEET WITH THE COWORKERS WHO WILL BE IMPACTED BY YOUR LEAVE** so you can develop a work transition plan. Discuss how they can help support your team in your absence and keep your projects moving while you're away.
- 5 WITHIN A WEEK BEFORE YOUR LEAVE:** If you have any approved, business-related expenses that you haven't submitted for reimbursement, submit them via Concur.
- 6 ON YOUR LAST DAY OF WORK:** Set up an out-of-office message on your email and provide the name, email, and phone number of the person who is covering for you. Update your voicemail message on your company phone as well. Also consider updating your Chatter profile picture so your colleagues know that you are out of the office. See sample profile picture to the right:



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BEFORE YOU RETURN FROM YOUR LEAVE: For most leaves, you should contact your manager and Matrix Absence Management two weeks before your scheduled return to confirm your return-to-work date.

- **IF YOU'RE TAKING A LEAVE DUE TO A MEDICAL CONDITION**, your physician must complete the [Fitness for Duty form](#) and return it to Matrix. Matrix must receive this form before you can return to work.
- **IF YOU'RE ON A PARENTAL LEAVE**, you're eligible for the Gradual Return Program, and should start speaking with your manager no later than two months before your return date.

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WITHIN 30 DAYS OF YOUR RETURN: If applicable, [make changes to or re-enroll in your benefits](#). If you're on a parental leave, you have 30 days from your child's date of birth or adoption to enroll him/her in Workday. Learn more about [adding your child to your benefits](#).

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WHEN YOU RETURN TO WORK: If you're returning from your leave of absence in the middle of a pay period, your status will not be updated in Workday until the 2nd or 17th of the month. Matrix will confirm your actual return date with your manager. Example: If you return on January 7, your status will be updated in Workday on January 17.



QUESTIONS?

[Contact Matrix Absence Management \(Leave of Absence\).](#)

For questions regarding your Incentive Compensation Plan, log a case in [Ask Sales Support](#).