mySedgwick Manager’s Guide for University of California, Irvine
• **Introductions**

• **mySedgwick System Demo**
  – Differences between Manager view and the Employee view
  – System Walk thru

**Helpful Notes:**
• Following the completion of this training session this Presentation as well as handouts will provided to you. This document has been designed in a manner to be utilized as a reference guide for you to use in your day-to-day utilization of mySedgwick
• Expectations of employee’s is that they are to communicate leave detail and absences to both Sedgwick and their Manager
mySedgwick® portal allows Employees, Managers, and Human Resources to:

- Search for claims
- Report new claims and intermittent leaves 24/7
- Review current leave status
- Confirm return to work
- Communicate with the Claims Examiner
- Upload Documents

You can access mySedgwick using Single Sign-On from your UCI net portal or by following this link: https://hr.uci.edu/sedgwick
mySedgwick® provides the ability to assign or act as a delegate. You can designate someone for a specific duration to perform tasks on your behalf:

- Click the menu button in the upper-left corner and select Delegate. Three options will appear for you to select from
  - **Act as a delegate:** The delegator’s Manager Dashboard opens, displaying claims and employees to which they have access. Also, a message displays at the top of the dashboard and every subsequent page you visit, reminding you that you are acting as a delegate.

To stop acting as a delegate, click in the message at the top of the page.
Manage My Delegates: There are three steps to establishing a delegate

- Search for an employee and select them as your delegate
  - Enter criteria to search for a user (to access previously used delegates, you may leave search fields blank and simply select My Delegates)
  - Click “Add Delegate” beside the Employee Name from your search results who is being designated as your delegate
  - To end the delegation, complete the search process and select “Remove Delegates”
- Edit the period during which they may act as your delegate
  - The start date will default to be effective immediately
  - Select “Edit Delegation Period” to select appropriate begin/end dates
- Manage their permissions
  - Select the “pencil” icon under permissions to manage your delegates permissions by selecting the box next to applicable items (Reporting intermittent absence, Report a new claim, etc....)
The Manager Dashboard in mySedgwick provides at-a-glance information about your employees’ claims via the **New Claims, Notifications, Open Accommodations** and **Employees Off Work** sections.

Additional features allow you to confirm return-to-work dates, search for an employee, communicate with the Claims Specialist, and learn more about leave, and ADA.

To avoid scrolling and easily access the features, click the menu button in the upper-left corner from the Manager Dashboard, as shown in the example below.
Manager Dashboard – Header Bar

- The menu, some refer to this as the “Hamburger”
  - Select to take you to sections and actions quickly
  - Report your employee’s new claim/intermittent absence or your new claim
- Select Dashboard
  - Allows you to change your view between your Manager Dashboard or the Employee Dashboard
- Preferences
  - Allows for you to Change Password
    - **IMPORTANT NOTE:** As a user setup for SSO. This section is not to be used. You should continue using single sign on
  - The Employee’s view would allow to change “Notification Preferences”
    - Allows the claimant to opt into text and email communications (Claimant only)
- Logout
  - Log you out of mySedgwick
To explore a section in more depth, click [MORE]. To return to this dashboard at any time, click Manager Dashboard at the top of the page.

Filter by Manager
Managers with employees that both directly and indirectly report to them can filter and include either group of employees. From the Filter by Manager section, search for and select other managers to add them to your dashboard and view information about their direct reports.

If you do not have direct reports, your dashboard will not display any information.
- Search for and select one or more managers from this feature to view their employees’ claims.
- Select the Include Indirect Reports option to view all employees within the selected managers’ organizations.
Manager Dashboard - Filter by Manager

Filter by Manager

Search by manager
1. Enter last name, first name, or EID
2. Select “Include Indirect Reports” when applicable
3. Click Search
4. Note: full value is not required

Helpful Hints
Filtering by manager is beneficial when you have many direct reports.

This will limit your dashboard details to focus on a smaller population
The **New Claims** section displays new claims that employees have filed in the previous 30 days

- Display includes; last day worked, first day absent, and hours worked for each employee’s claim.
- You can make updates in this area if changes are necessary or Click ✅ to confirm that everything is correct.
  - Update Last day worked (LDW) or first day absent (FDA) by selecting the calendar icon next to the incorrect date
  - If hours listed are incorrect, Click on the hours and enter the correct value
  - Once the update is completed, Click ✅
  - A confirmation pop up will appear summarizing the changes

### Helpful Hints
Click an employee’s name to view that employee’s dashboard and get additional claim information. (Names and Claim Numbers in **blue font** are hyperlinks!)
The New Claims section also includes the option of reporting a new claim on the behalf of an employee
• Once information is entered there will be an opportunity to review and make edits prior to submitting
• Once submitted a confirmation number will be assigned

1. Click the Report a New Claim Section
2. Search by Employee Name or EID
3. In the results select the icon below “Report a New Claim”
4. You will be redirected to the intake screen; follow the prompts
5. Prior to hitting submit you will have the option to review entries and make edits
6. Once submitted a Confirmation will pop up along with a summary of what you submitted

Claim #: 40211102B8C0001
A Leave claim has been submitted. The claim number is 40211102B8C0001. Please use this number on any associated correspondence.

As a follow-up, an acknowledgement letter and an authorization form will be sent to you. These forms need to be completed and returned to us. After reviewing your claim, if your Leave Specialist has any questions, you will be contacted.

As a reminder, please be sure to notify your supervisor of your request for leave and any associated time off.

When you take an intermittent absence, please ensure you follow your normal call-in procedures for your facility/department.

Sedgwick
P.O. Box 14454
Lexington, KY 40512
Email:
Phone: 855.253.0820
Fax: 859.280.4827
The **Notifications** section displays updates and important events regarding your employees’ claims.

Click 👈 to select the types of notifications displayed.

Click ➡️ to view additional notifications for the employee.

Click an employee’s name to view their Employee Dashboard.
The “Employees Off Work” section displays your employees who are currently off work, the type of claim that resulted in the absence, and the dates they will be absent.

Click to see all the claims an employee currently has when they have more than one

Click the employee’s name to view their Employee Dashboard

Click “More” to see additional employee's currently off work
From this section, you can confirm ✅ that an employee has actually returned to the workplace, update their Return-to-Work Date 🗓️ or indicate that the Employee Has Not Returned 🚫.

**Confirm RTW**
1. Click the check mark icon under the “Confirm” header
2. Confirmation screen will pop up
3. Select Ok if correct/Back to change

**Update RTW**
1. Click the calendar icon next to the listed RTW date
2. Click the checkmark to confirm
3. Confirmation screen will pop up
4. Select Ok if correct/Back to change

**Notify Examiner that Employee has not RTW**
1. Click the calendar icon next to the listed RTW date
2. Confirmation screen will pop up
3. Select Ok if correct/Back to change
The **Search** section allows you to search for a specific employee to view their employee dashboard and other important information like claim(s) status and leave balances or file a new claim on their behalf. You can search by:

- First Name
- Last Name
- Employee ID
- Claim Number

Click **Advanced Search** to access additional search options such as the type of claim, dates, claim status, and sub status.
The Advanced search will allow you to specify the exact criteria to search for Absences and Accommodations. Options include details such as Claim status, Claim type, absence type, etc..

- **Name:** Click the employee’s name to open the Employee Dashboard where you can view any **Tasks Requiring Attention** as well as their **Leave Calendar, Communication Center, and Activity Stream**

- **Claim Number:** Click the claim number to open the Claim Overview page and view details about the claim

- **Export:** Click the “Select One” drop-down menu below the search results list and choose whether to save your results as a PDF or CSV file, then click † **EXPORT**

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**Leave Balance Summary**

Available hours and days are an estimate and can vary based on changes to the work schedule. They are meant for informational purposes. Actual leave balances are calculated in weeks and portion of weeks rather than hours or days per policy guidelines.

Pending represents future time away from work or time away from work where a decision has not yet been made.

- California Family Rights Act
  - **Maximum(weeks):** 12.00
  - **11.33 weeks**

- Federal Family and Medical Leave Act
  - **Maximum(weeks):** 12.00
  - **11.33 weeks**

**Helpful Hints:**

Click Leave Balance Summary to get a Quick look of balances by Policy.
The “Open Accommodations” section displays your employees who currently have an open ADA claim.

Click ➤ to see all the claims an employee currently has when they have more than one.

Click the employee’s name to view their Employee Dashboard.

Click “More” to see additional employee's currently off work.

For employees in a “pending business response” status click edit to approve or reject job functions and accommodation requests.

Open Accommodations

<table>
<thead>
<tr>
<th>NAME</th>
<th>TYPE</th>
<th>STATUS</th>
<th>BEGIN</th>
<th>END</th>
<th>EMPLOYEE ID</th>
<th>EDIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange Aqua</td>
<td>LOA</td>
<td>Pending business response</td>
<td>01/11/2021</td>
<td>03/12/2021</td>
<td>900090933</td>
<td></td>
</tr>
<tr>
<td>Black Blue</td>
<td>Not Determined</td>
<td>Currently accommodated</td>
<td>03/16/2021</td>
<td>04/30/2021</td>
<td>900091082</td>
<td></td>
</tr>
</tbody>
</table>

Helpful Hints:

Edit Icon – only displays where Status = Pending Business Response.
• Accommodation edit functionality to approve or reject job functions and accommodation requests
  – Once Edit is selected, each section can be expanded by selecting the 

Open Accommodations

Orange Aqua - C103220900200003TCAR, Customer Service Manager, 03/22/2021

▶ Job Functions
▶ Accommodation Requests

▶ Approved Job Functions

CANCEL SAVE

BACK TO TOP
Manager Dashboard – Open Accommodations cont.

- **Job Functions**: Applicable Job Functions will be listed, select Yes/No
  - If answering “No” a text box will appear to enter in comments/clarifications

  ![Job Functions](image)

  Adjust power production systems to meet load and distribution demands.

  Is this a valid job function?
  - [ ] Yes
  - [ ] No

- **Accommodation Requests**: Applicable Accommodation Requests will be listed, select Approve/Reject
  - If answering “Reject” a text box will appear to enter in comments/clarifications

  ![Accommodation Requests](image)

<table>
<thead>
<tr>
<th>START</th>
<th>END</th>
<th>TYPE</th>
<th>IMPACT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/11/2021</td>
<td>5/13/2021</td>
<td>Desk Location</td>
<td>Temporary</td>
<td>text</td>
</tr>
</tbody>
</table>

  - [ ] Approve
  - [ ] Reject

- **Approved Job Functions**: View current job functions along with associated job functions
  - This information can be helpful when making decisions on the accommodation options or when proposing alternatives in the comments when options are marked rejected

- Once selections are complete, click ![SAVE](image) your Leave Specialist is then notified of selections and the system will be updated along with the status in mySedwick

**Helpful Hints:**
This functionality provides a great alternative to managing email requests!
The Communication Center enables you to communicate directly with the claim specialist through mySedgwick.

1. Click **Open** to start a conversation thread
2. Type your question or message to the claim specialist in the text box at the bottom of the section.
3. The Claim Specialist will be notified of the message and should respond within one business day.
4. A response from the Claim Specialist will be indicated under New Messages

**Helpful Hints**
You can only see message threads sent by YOU!!
The Learning Center is a document library offering information to assist and educate you throughout the claim process.

Click Visit The Learning Center to open the Learning Center and read about Leaves, Accommodations, or Disability. Using the “Navigate to...” drop down menu, you can go directly to the specific detail you are looking for.

Additional information and helpful links from The Learning Center

- FAQ/Training Documents and Helpful Link include Sedgwick Forms along with UCI Guides
- Helpful Videos will link you to educational videos to guide you through the claim process
- Select open next to the applicable option
Easy access to educational videos provides additional detail for both managers and employees on the following topics:

- **Manager Videos**
  - Your Employee’s New Claim
  - Your Employee’s Claim Approval
  - Your Employees LOA Denial
  - Your Employee’s Return to Work

- **Employee Videos**
  - Your New Claim Confirmation and Information Packet
  - Your Medical Documentation Due Date Reminder
  - Your Approval

**Helpful Hints**
Videos provide an additional method of sharing detail regarding expectations and timelines in relation to claim processing.

Links also appear in applicable communications.
The Employee Dashboard provides managers a view of the employee’s leave calendar, activity stream and a communication center for interacting with the examiner.

- It also provides a combined list of tasks needing attention, providing quick and easy access to items requiring your consideration.

- To access the Employee Dashboard, use one of the following selections
  - select an employee name (blue font) Orange Aqua from the Manager Dashboard
  - click Employee Dashboard under the “Select Dashboard” drop down to search for an employee and view their information

- Once you are there, the screen will include an “Header”
Tasks Needing Attention feature is available at the top of the Employee Dashboard, providing a combined listed of tasks needing your consideration, such as confirmation of new claims and employees that have returned to work, and acknowledgment of notifications about important claim events. The total number of tasks is available at a glance; click the down arrow to expand the section and view tasks by group.

Three groups of tasks needing attention are displayed:

• New Claims that require confirmation
• Notifications of information that need to be addressed
• Confirm Return to Work group.

All three group headings display the number of tasks requiring attention within their group.
These groups provide the same information and functionality as their corresponding sections on the Manager Dashboard. Completing a task removes it from this task list as well as the Manager Dashboard.

To expand a group and view specific tasks, click the arrow beside the group.
Tasks Needing Attention

1. Continuous
   Tammy Timeaway determination on their Continuous leave of absence will be made by 3/13/2019.

2. Continuous
   Tammy Timeaway anticipated return to work date on their Continuous leave of absence is 4/16/2019.

CONFIRM RETURN TO WORK

For more information about features on the Employee Dashboard, refer to the Employee Reference Guide.
• From the Employee Dashboard a listing of claims will appear for that individual
  – This will provide high level detail regarding the date the absence began, the type of claim, claim number, and the status
  – Click the blue Claim number to see further detail on a particular claim
  – There is also a shortcut to the learning center

**Orange Aqua's Claims**

<table>
<thead>
<tr>
<th>BEGIN DATE</th>
<th>TYPE</th>
<th>CLAIM NUMBER</th>
<th>STATUS</th>
<th>REPORT RETURN TO WORK</th>
<th>LEARNING CENTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/11/2021</td>
<td>Continuous LOA - Employee Medical</td>
<td>B710260191100001AA</td>
<td>Open - Approved</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Employee Dashboard for Managers – Activity Stream

The Activity Stream provides the activity over the life of the claim

- Keep track of claim updates
- Note upcoming important dates from start to finish
- Provides a timeline of activity including:
  - First date absent reported as xx/xx/xxxx
  - Date communications sent
  - Effective date of each claim status change
  - Dates for when medical is due
• Select a claim to view the Claim Overview
  – “I would like to...”
    • Access the drop down to select different actions based on the type of claim you are viewing.
      • Options include uploading documents, reporting a return to work, reporting absences, etc....
  – “Select claim...”
    • Access the drop down to select other claims under the Employee’s name
Upload Document

- Select **ADD FILE(S)** and select the saved document you would like to upload

- Select “submit” which will populate a Confirmation Screen for you to confirm upload

  ![Confirmation Screen](image)

  **Confirmation**

  You are about to upload the selected files and you will not be able to cancel this action. Do you want to continue?

  ![Confirmation Options](image)

  - **Cancel**
  - **Ok**

- Select “ok” which will populate a popup to reflect the document status

  ![Upload File](image)

  **File Name**

  TEST.docx

  **Delete**

  **Status**

  Success
The Claim Overview section provides a quick view of important facts being used to process the selected claim

- **Details (LOA & ADA)**
  - Links to helpful videos
  - Important dates based on the type of claim selected such as; Leave Begin and End, Leave Exhaustion, Next Medical Due, Date if Initial Interaction
  - Calendar which displays time away from work related to the claim you are viewing (Reminder: Click “More” to expand beyond the current week) (Leave of Absence)

- **Certifications (LOA)**
  - Provides important dates related to certification such as dates sent, received, reviewed and due

- **Leave Balances (LOA)**
  - Shows how much time has been used of a Leave Policy and the exhaust date

- **Work Schedule (LOA)**
  - Includes schedule that we have on file

- **Communication Center (LOA & ADA)**
  - Use to communicate directly with your Examiner (These messages are tied to the selected claim)

- **Accommodations (ADA)**
  - Details of the accommodation
  - Outcome Date and Description
  - Calendar which displays approved days under ADA
Click an absence on the calendar to view its status and see the related claim number.

Calendar detail may be exported to CSV or PDF for a specified range.

Select “More” To expand the Calendar to a monthly view.

### Helpful Hints

Claims Calendar is accessible from the Employee Dashboard (Which includes all applicable claims)

Or the Claim Level view (includes only selected claim detail)

Refer to the blue information box as reference.
Employee Dashboard for Managers – Claims Calendar cont.

Claims Calendar

Your claim has been approved.
Continuous LOA - 1000000000000IFN

Tammy Timeaway

Continuous LOA

Claim Type | Leave Type | Leave Status                             | Leave Caused By
-----------|------------|------------------------------------------|------------------
Continuous | Employee Medical | Open - Approved - None                    | Other

By clicking on a date in the Claims Calendar, a new window will populate to show the current case status.
## Claim Status Definitions

### Leave of Absence

- **Open – Pending**
  - New case, eligibility under review
- **Open – Conditional**
  - Eligibility confirmed - future first day absent or we are awaiting certification
- **Open – Approved**
  - Absence is approved and certified
- **Closed – Conditional**
  - Intermittent time was requested however never taken
- **Closed – Cancelled**
  - Duplicate Case, Employee requested cancelation or UCI advised to close a employer specific policy
- **Closed – Terminated**
  - Separation of employment
- **Closed – Denied**
  - Not eligible or Eligible but no certification received

### ADA

- **Open**
- **Closed**