

## Short-Term Disability / Family Medical Leave Checklist for Employees in the U.S.

#	Task	R/O	Date Completed
<b>Before your leave</b>			
1	Notify your manager as soon as you know you will be away from work for 5 or more consecutive days. Review any applicable leave policies including the Parental Leave Benefit, Family and Medical Leave and Leave of Absence operating procedures. HR Intranet -> Reference & Help -> Operating Procedures (P&P)	REQ	
2	Review the Family and Medical Leave Policy. HR Intranet -> Reference & Help -> Operating Procedures (P&P)	REQ	
3	Review the Leave of Absence Policy. HR Intranet -> Reference & Help -> Operating Procedures (P&P)	REQ	
4	Review the Sick Time operating procedure. HR Intranet -> Reference & Help -> Operating Procedures (P&P)	OPT	
5	Review the <a href="#">Short-Term Disability (STD) Guide</a> to learn about the STD process and important information. BMO US Benefits -> Disability Leave	REQ	
6	Review your vacation and sick time balance in <a href="#">Workday</a> . Decide if you want to use sick or vacation time during any unpaid leave.	REQ	
7	If your leave is planned, contact your manager and BMO's leave administrator, Matrix, at 1-888-295-7862 within 30 days prior your intended leave. You can also file your claim online at <a href="#">www.matrixabsence.com</a> .	REQ	
8	If your leave is unplanned, contact your manager and BMO's leave administrator, Matrix, at 1-888-295-7862 within 2 days of learning of the need for a leave. You can also file your claim online at <a href="#">www.matrixabsence.com</a> .	REQ	
9	Provide your medical provider's information to BMO's leave administrator, Matrix, so the required documentation for FMLA and STD can be sent to your provider.	REQ	
10	Determine if the state you live in provides paid disability leave or paid family leave benefits and initiate a claim through your state. Matrix can confirm this for you if you are unsure. Any paid leave benefits provided by BMO will be offset by any paid benefits provided by your state.	REQ	
11	Contact Employee Assistance Program for additional advice or resources. HR Intranet -> Benefits at a Glance -> When EAP Can Help	REQ	
12	Enter your time off in Workday for any unpaid portion of your leave if you would like to substitute sick and/or vacation time for pay. Contact your manager to enter the time on your behalf if you cannot enter your time.	REQ	
13	If you will be taking intermittent FML, ensure you report your missed hours to BMO's leave administrator, Matrix, and enter your time away in Workday. Refer to the intermittent FML guide for additional instructions on how to report time. HR Intranet -> Reference & Help -> Guides	REQ	
14	Review the <a href="#">Accessing Workday</a> page for information on accessing <i>Workday</i> outside the BMO Network. Set up your <i>Workday</i> security credentials if you have not already done so.	REQ	

#	Task	R/O	Date Completed
15	<p>Are you a people manager? Will you need to delegate tasks to your manager or another manager while you are out? If so, you can:</p> <ul style="list-style-type: none"> <li>• Set up delegation in Workday</li> <li>• Ask your manager to submit a request to assign a new manager to your sup org. Your manager can submit a request by typing in the Workday search bar "Create Request" and then select "edit the Supervisory Organization."</li> </ul>	REQ	
<b>Returning to work</b>			
16	Notify BMO's leave administrator, Matrix, and your manager 5 days before your return to work to confirm your return-to-work date.	REQ	
17	Notify BMO's leave administrator, Matrix, and your manager if there is a change in your return-to-work date.	REQ	
18	Contact BMO's leave administrator, Matrix, and your manager on your first day back at work to confirm that you have returned.	REQ	
19	Ensure that your manager responds to the email from BMO's leave administrator, Matrix, to certify that you have returned to work. This is a critical step to return you to active status and resume receiving pay.	REQ	
20	If you are returning to work with a partial return to work status, ensure you enter your hours worked into Workday. HR Intranet -> Benefits -> Disability -> Returning to Work	REQ	
21	If you are a people manager and delegated your tasks, remember to cancel your delegation. If your manager assigned a new manager to your Supervisory Organization, follow up with your manager to update the Supervisory Organization.	REQ	