

Employee Checklist for Short Term Disability Leave (Medical)

Prior to the Start of the Leave	
<input type="checkbox"/>	Notify your manager and your leave of absence specialist or local HR Office of your need for Short Term Disability (STD) at least 30 days in advance of your anticipated last day of work, if possible, to discuss your options.
<input type="checkbox"/>	Visit HARVie (http://hr.harvard.edu/disability) to learn about STD benefits (http://hr.harvard.edu/files/humanresources/files/std_overview.pdf) and read “ Reporting Your Short Term Disability Claim ” for information about filing a STD claim.
<input type="checkbox"/>	Call Lincoln Financial Group (“Lincoln”) at 844-600-3978 or go to www.MyLincolnPortal.com to initiate the claim process.
<input type="checkbox"/>	Lincoln will send you an Acknowledgement letter to confirm initiation of your claim along with an Authorization to Release Information Form. Sign and date the form and leave with your medical provider. If your medical provider requires a facility specific Authorization Form, Lincoln will accept that form. The form is also included as part of the “Reporting Your Short Term Disability Claim” document.
<input type="checkbox"/>	Contact your medical provider to ensure Lincoln receives proof of disability, which may include office treatment notes, test results, prescription histories, specific restrictions/ limitations and treatment plans from all treating providers. Provide the requested information as soon possible, but no later than 30 days, to avoid a claim determination delay and/or potential impact to your STD pay.
<input type="checkbox"/>	Work with your manager to make arrangements for your absence. Contact your leave of absence specialist or local HR Office if you have questions.
<input type="checkbox"/>	Complete the Certification of Healthcare Provider Form provided by HR. Return it to your leave of absence specialist or local HR Office within 15 days.
<input type="checkbox"/>	If you are able, enter absences (sick, vacation, personal time) in PeopleSoft to account for the two- week waiting period and/or sick time spend down before STD pay begins* Note: You will not have the ability to enter time or absence requests in PeopleSoft once on STD payroll.
<input type="checkbox"/>	Respond promptly to information requests from Lincoln, your leave of absence specialist or local HR Office and your department.
During the Leave	
<input type="checkbox"/>	Respond promptly to information requests from Lincoln, your leave of absence specialist or local HR Office.
<input type="checkbox"/>	Lincoln determines your period of disability based on medical information received. If your condition requires an extension and you are unable to return to work as planned, notify Lincoln and your leave of absence specialist or local HR Office immediately. To substantiate continued disability, you must submit additional medical information from your providers within 45 days. Failure to do so may impact your STD pay.
<input type="checkbox"/>	Remain in contact with your leave of absence specialist or local HR Office. Call your manager and your leave of absence specialist or local HR Office at least 2 weeks before your anticipated return to work date to discuss the return to work process and your return to work date.
<input type="checkbox"/>	If you require accommodations or have restrictions, notify your leave of absence specialist or local HR Office ASAP. These must be negotiated PRIOR to your return to work. See the “ Reasonable Accommodation Fact Sheet ” for more information.
Prior to Return from Leave	
<input type="checkbox"/>	During your last medical visit prior to returning to work – bring a copy of your job description, which you will receive from HR and obtain written medical certification from your provider that you can return to work.
<input type="checkbox"/>	Provide your leave of absence specialist or local HR Office with a copy of your return to work documentation. <i>You will not be allowed to return to work without this document.</i> If your medical provider is suggesting any work accommodations or altered work schedules, notify your leave of absence specialist or local HR Office ASAP.

*Please note: Waiting period criteria

There is a 2-week waiting period in which you can be paid with accrued sick or vacation days or personal days or any combination of these (unless your collective-bargaining agreement only allows the usage of sick time during leave of absence). If you have no paid time off (PTO) available, this waiting period will be unpaid time.

- If your sick balance exceeds 40 days then you must use 25 days of sick time or spend down to a balance of 40 days, whichever comes first.
- Service and Trade staff must meet the requirements outlined in their collective-bargaining agreements
- The two week waiting period and any applicable spend down period count towards the 26 week STD maximum benefit period. If you are a seasonal worker and disabled when not scheduled to work, this time will also count towards the 26-week STD maximum benefit period.