



CASE STUDY

A blue-tinted photograph of a diverse group of business professionals in a meeting, looking at documents and talking. The image is partially obscured by geometric shapes: a white triangle at the top left, a grey triangle at the top right, and a dark grey triangle at the bottom left.

ALLIANZ SAVES TIME MANAGING LEAVE

WITH PRESAGIA



KEY FACTS

Industry: Insurance

U.S. Headquarters: Richmond, VA

Established: 1983

Employee count: 700+

Formed by merging three of Allianz global entities in 2014, Allianz Worldwide Partners provides specialty insurance and assistance services to millions of customers across the globe. The US office of Allianz Worldwide Partners, based in Richmond, Virginia, offers customers travel insurance, event protection and tuition insurance.

While the formation of this Allianz company is relatively new, the U.S. travel insurance division was established in the mid- 1980s. With this breadth of experience, Allianz Worldwide Partners

knows that among their most valuable assets are its employees. With that in mind, the US operation decided to modernize their leave management process to optimize their efficiency and ensure they could handle employee leave requests on time and with ease. To do that, they trusted Presagia. **This is their story...**

A LACK OF WORK-LIFE BALANCE

Teresa Wallace, Senior Human Resources Consultant at Allianz Worldwide Partners, USA, manages Employee Relations for the Operations Division. In this department, she has about 400 employees she works with on a regular basis.

The Operations Division is primarily composed of hundreds of call centre employees servicing clients in need of insurance support. In general, call centers can be difficult places to work due to their stressful nature, and call centre employees tend to have high FMLA usage rates. Wallace manages close to 100 leave cases a year, usually having approximately 70 open at a time, with about 60 for intermittent leave. And, many employees have multiple open intermittent cases. This is a lot to manage, especially with a simple spreadsheet.

Wallace found her days slipping away, spending many hours running between her office and the scanner to scan the forms she needed to input into the computer. The amount of manual work needed to manage leaves became a

heavier burden than expected. Wallace describes this period of managing leave manually as “very, very time-consuming.”

One of the biggest pain points for Wallace was managing recertifications. Allianz Worldwide Partners’ policy is to do so every 6 months, which when done manually, made Wallace feel as though it was a task she was performing continuously.

Another concern Wallace had with her leave management process was the compliance aspect. She worried about being audited because all of their documentation for leave management was in multiple files.

Oftentimes, Wallace found herself staying at the office hours later than she intended to, managing leaves. Her lack of a tangible work-life balance due to an inefficient leave management process and a complex work environment led her to begin researching a more viable solution.

“Prior to Presagia, everything we did with leave was manual... the email, typing up the forms, creating the correspondence packets, copying, and scanning. It was very, very time-consuming.”



THE SWITCH TO PRESAGIA

Wallace and her team turned to Presagia about 1 year ago and haven't looked back! Having chosen Ultimate Software's (Presagia is their leave management partner) UltiPro Human Capital Management (HCM) System, adding Presagia's absence management solution made sense. Allianz Worldwide Partners was attracted to the partner-integrated solution, finding it to be the complete package that they needed for their HCM.

Wallace found an initial learning curve with using a software solution. She explains that it used to take her awhile to move through procedures, as she wanted to make sure she understood each screen before moving forward. However, she eventually realized that if she was unsure of something she could simply exit without saving her changes and come back later. She could also rely on the system's wizards which intelligently guide you through each step of the leave management process. From requesting a leave, to sending out the proper forms, the

wizards are there to help. This user-friendly feature made all the difference when Wallace was first learning how to use the system.

Wallace's favorite feature of Presagia is initiating the case and sending out the forms. She says it's incredibly fast compared to old procedures. She explains, "I basically go in, request a leave, type in a little bit of information and hit a button, and the forms are gone!"

Gone also are the days when Wallace spent half her time walking back and forth to the scanner. Now, everything she needs is housed in Presagia which she finds to be a tremendous time saver.

The system also gives Wallace a greater ability to manage trickier cases. Those difficult intermittent leave cases have become a bit less tricky with the help of Presagia. The system has the ability to manage employees' multiple chronic conditions and track entitlement for all

policies, across all cases. With Presagia, Wallace can quickly check if employees qualify for another leave if the FMLA is already exhausted, all with a click of a

button. In addition, Presagia's alert tool tells Wallace if an employee is taking absences more frequently than they were approved for, or if a pattern is developing.

"It's a lot to keep up with, but easier with the system. I am thrilled that we have it, and wouldn't give it up!"

HOW IT WORKED OUT

So, now that they've had Presagia for enough time to get to know the system, how have things changed? Wallace is no longer staying late managing leaves. She gets out on time and then some, using her extra time at the office to interact with her employees and give leave management a more personal touch.

Looking at the numbers, Wallace's team has enjoyed an over 75% reduction in administration efforts for leave management since switching to Presagia, savings that can be reallocated to other Human Resources functions.

And those parts of leave management that really gave her headaches, such as recertifications? Now it's simply a few clicks of a button to reissue the recertification, and immediately the forms are in her employees' mailboxes. Presagia's system automatically initiates recertification after 6 months and creates all of the correspondence for you. This streamlines the process and ensures that the leave manager will never miss a deadline.

Wallace also feels a sense of security knowing that if those dreaded audits do occur, she is no longer relying on assorted files; she has everything safe and secure in one place, Presagia.

"I can honestly say, from a work perspective it's changed my life. It's given me my work-life balance back."

ABOUT PRESAGIA

Founded in 1987, Presagia has a long history of helping organizations solve complex business problems with easy-to-use solutions. Today, this means providing cloud-based absence management solutions that enable organizations to be more efficient, control lost time and risk, and strengthen compliance with federal, state and municipal leave and accommodation laws.