



Managing an Employee Leave Request

A Five-Step Framework

Introduction

Managing an employee leave request can involve multiple laws, requirements, and business considerations. Having a consistent process can help you identify your responsibilities, support the employee, manage the leave appropriately, and address the impact of the employee's absence on your business.

This HR@Work Tool provides a five-step framework for managing an employee leave request from the initial conversation through the employee's return to work. The framework includes practical job aids you can use to evaluate, document, and manage the leave, including a Leave Request Intake Worksheet, Leave Law Screening Table, Leave Law Assessment Worksheet, Leave Administration Tracker, Work Coverage Plan, and Return-to-Work Plan.

Use this Tool together with the HR@Work Tool *Employee Leave Laws at a Glance* to help identify and evaluate the state and federal leave laws that may apply.

The five steps that follow provide a consistent process you can use each time an employee needs leave. Start by understanding the employee's request, then work through each step to identify applicable leave laws, determine your responsibilities, manage the leave and the employee's work during the absence, and prepare for the employee's return.

The 5-Step Framework for Managing Employee Leave Requests



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Step 1. Understand the Leave Request

Your Goal: Capture the basic information needed to understand the employee's request and begin identifying the leave laws and protections that may apply.

Job Aid: Leave Request Intake Worksheet

Employee and Request Information

Employee Name: _____

Job Title/Department: _____

Manager: _____

Date Request Received: _____

Expected Leave Start Date: _____

Expected Duration: _____

Anticipated Return Date, if known: _____

Reason for Leave

Check all that may apply.

- ☐ Employee's own health condition
- ☐ Care for a family member
- ☐ Pregnancy or childbirth
- ☐ Pregnancy loss or failed assisted reproduction, adoption, or surrogacy
- ☐ Bonding with a new child
- ☐ Work-related injury or illness
- ☐ Military service
- ☐ Military family need
- ☐ Domestic violence or abusive behavior
- ☐ Child school/medical or elder-care need
- ☐ Other: _____

Leave Timing

- ☐ Continuous leave
- ☐ Intermittent leave
- ☐ Reduced work schedule
- ☐ Not yet known

Information Needed for Planning

Is the need for leave foreseeable? ☐ Yes ☐ No

Could the timing or duration change? ☐ Yes ☐ No ☐ Unknown

Are there immediate work or coverage needs that should be addressed? ☐ Yes ☐ No

If yes: _____

Confidential Leave Record: Maintain this worksheet with the employee's confidential leave records and separately from the regular personnel file, as appropriate. Record only information needed to evaluate and administer the leave.



Keep the Conversation Focused:

Ask only for the information needed to understand the general reason for leave, anticipated timing and duration, and immediate planning needs. Do not ask for a medical diagnosis or unnecessary medical details.

Step 2. Identify the Leave Laws That May Apply

Your Goal:

Use the reason for leave identified in Step 1 to determine which state and federal leave laws and other protections may need to be considered.

Job Aid: Leave Law Screening Table

If the employee needs leave because of...	Using the Employee Leave Laws at a Glance Tool, consider the following laws and check all that may apply
Their own serious health condition	☐ MA PFML ☐ FMLA ☐ MA Earned Sick Time ☐ ADA (if applicable)
A family member's serious health condition	☐ MA PFML ☐ FMLA (depending on family relationship) ☐ MA Earned Sick Time
Pregnancy, childbirth, or a pregnancy-related medical condition	☐ MA PFML ☐ FMLA ☐ MA Earned Sick Time ☐ MA Parental Leave (depending on reason for leave) ☐ ADA and/or MA Pregnant Workers Fairness Act, if applicable
Pregnancy loss or failed assisted reproduction, adoption, or surrogacy	☐ MA Earned Sick Time ☐ Other applicable laws or protections, depending on circumstances
Bonding with a new child through birth or adoption	☐ MA PFML ☐ FMLA ☐ MA Parental Leave
Bonding following foster care placement	☐ MA PFML ☐ FMLA
A work-related injury or illness	☐ MA Workers' Compensation ☐ FMLA ☐ MA PFML ☐ ADA (if applicable)
A child's school event or medical appointment, or certain elder-care needs	☐ MA Small Necessities Act ☐ MA Earned Sick Time (depending on reason)
Domestic violence or abusive behavior involving the employee or a family member	☐ MA Domestic Violence Leave Act ☐ MA Earned Sick Time
Military service	☐ USERRA
A qualifying military family need	☐ MA PFML ☐ FMLA
Another reason not listed above	☐ Review applicable employer policies and other laws or protections that may apply



Step 3. Determine Employee Eligibility and Your Responsibilities

Your Goal: Using the Employee Leave Laws at a Glance Tool, evaluate each law or protection identified in Step 2 to determine whether it applies to your organization, whether the employee is eligible, and what responsibilities you have.

Job Aid: Leave Law Assessment Worksheet

Complete the table for each law or protection identified in Step 2, then complete the remaining sections of this worksheet.

Questions to Answer	Law/ Protection #1	Law/ Protection #2	Law/ Protection #3
Name of Law/Protection			
Does it apply to your organization?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Does the employee meet the eligibility requirements?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Does the reason for leave qualify?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
What is the maximum leave entitlement, if applicable?			
How much leave is currently available to the employee?			
Does the law provide or require paid leave/benefits?	☐ Yes ☐ No ☐ Varies	☐ Yes ☐ No ☐ Varies	☐ Yes ☐ No ☐ Varies
Is the leave job protected?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
What notices, forms, certifications, or documentation are required?			
Can/must this leave run concurrently with another applicable leave? If yes, which ones?			

Need More Space? If more than three laws or protections may apply, use an additional copy of this page.

Determine Your Next Steps

Use this checklist to determine and complete your next steps.

- ☐ Identify the laws and protections that apply to the leave
- ☐ Determine the amount of leave available under each applicable law
- ☐ Determine whether applicable leaves will run concurrently
- ☐ Identify required notices, forms, certifications, documentation, and deadlines
- ☐ Determine applicable pay, benefits, and job-protection requirements
- ☐ Review your organization's leave and time-off policies and other benefits that may apply
- ☐ Document your determination and the actions that need to be taken

Resources Reviewed

- ☐ *Employee Leave Laws at a Glance*
- ☐ Applicable state/federal agency guidance
- ☐ Organization policies
- ☐ Employee leave records
- ☐ Other: _____

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Remember: Evaluate each potentially applicable law separately. An employee who is not eligible under one law may qualify under another, and exhausting leave under one law does not necessarily mean all available leave or other protections have been exhausted.

Confidential Leave Record: Maintain this worksheet with the employee's confidential leave records and separately from the employee's regular personnel file, as appropriate. Record only information needed to evaluate and administer the leave.

Step 4. Manage the Leave

Your Goal: Manage the employee's leave, meet applicable requirements, maintain appropriate communication, and plan for how the employee's work will be handled during the absence.

Managing an employee's leave requires attention to both leave administration and the work that needs to continue while the employee is away. Use the two job aids that follow to plan for both.

Job Aid: Leave Administration Tracker

Action/Requirement	Due Date	Date Completed	Notes
Required notices/forms provided			
Required certification/documentation obtained			
Leave dates confirmed/recorded			
Required payroll/benefit actions completed			
Leave-related communication plan established			
Leave usage/remaining leave reviewed			
Concurrent leave tracked, if applicable			
Changes to leave dates/status documented, if applicable			
Other: _____ _____			

Job Aid: Work Coverage Plan

Consider:

- ☐ What work must continue?
- ☐ What can be postponed or temporarily stopped?
- ☐ Can responsibilities be redistributed?
- ☐ Do employees covering the work need additional authority, information, or training?
- ☐ Is temporary or contract help appropriate?
- ☐ How is the additional workload affecting other employees?
- ☐ Does the coverage plan need to change if the leave is extended?

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Work Coverage Plan:

Use the table below to identify the work that needs to be covered, how it will be covered, and who will be responsible.

Work/Responsibility	Coverage Plan	Person Responsible
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Temporary/Contract Help Needed: ☐ Yes ☐ No

Additional Training/Authority Needed: ☐ Yes ☐ No

Coverage Plan Review Date: _____

Other Actions Needed: _____

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Step 5. Prepare for the Employee's Return

Your Goal: Prepare for the employee's return to work, address any return-to-work requirements or restrictions, and plan for a smooth transition back to work.

Job Aid: Return-to-Work Plan

Complete this worksheet to plan the employee's return to work.

Return-to-Work Information

Anticipated Return Date: _____

Confirmed Return Date: _____

Employee expects to return:

- ☐ To regular schedule and duties
- ☐ With work-related restrictions
- ☐ On a reduced or modified schedule
- ☐ Unable to return as anticipated
- ☐ Return date/status not yet known
- ☐ Other: _____

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Return-to-Work Checklist

- ☐ Confirm the employee's expected return-to-work date.
- ☐ Determine whether return-to-work or fitness-for-duty documentation is required and permitted under applicable law.
- ☐ Determine whether the employee has work-related restrictions that need to be addressed.
- ☐ Determine whether the employee is entitled to reinstatement to the same or an equivalent position.
- ☐ If the employee cannot return as expected, determine whether additional leave or another workplace accommodation may need to be considered.
- ☐ If restrictions or a need for accommodation are identified, determine whether to engage in the interactive process.
- ☐ Update payroll, benefits, work schedule, systems access, and other administrative arrangements as needed.
- ☐ Communicate with employees who have been covering the work about the transition.
- ☐ Document the employee's return and any ongoing arrangements.

Transition the Work Back to the Employee

Using the Work Coverage Plan from Step 4, identify the work and responsibilities that will transition back to the employee and the effective date.

Work/Responsibilities that Will Be Transitioned Back to Employee	Effective Date
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Ongoing Work Arrangements or Accommodations, if applicable:

Follow-Up Date, if needed: _____

Remember: Do not assume that an employee who cannot return on the anticipated date has exhausted all available protections. Additional leave or a reasonable accommodation may need to be considered under other applicable laws.

Confidential Leave Record: Maintain this worksheet with the employee's confidential leave records and separately from the regular personnel file, as appropriate. Record only information needed to evaluate and administer the leave.

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