

UCI® Human Resources

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# 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>

UCI University of California, Irvine

Login with your UCInetID

UCInetID

Password

[Forgot your password?](#)

Login


[Activate my UCInetID](#) • [Need help logging in?](#)  
[View recent account activity](#)

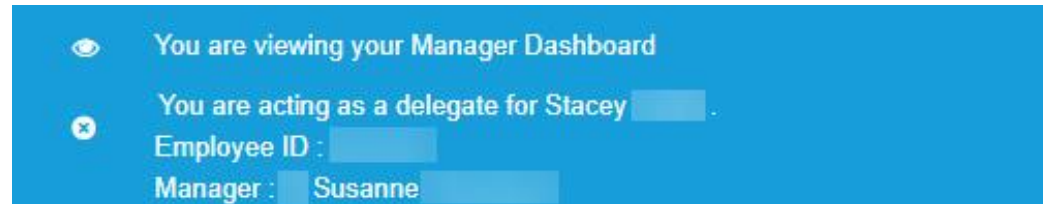
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mySedgwick® provides the ability to assign or act as a delegate. You can designate someone for a specific duration to perform tasks on your behalf :

- 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....)

ADD DELEGATE	EMPLOYEE NAME	EMPLOYEE ID	DATE HIRED	DELEGATION PERIOD START	DELEGATION PERIOD END	EDIT DELEGATION PERIOD	PERMISSIONS	REMOVE DELEGATES
	Amber K		1/16/2017	1/18/2015	1/18/2020			

Select One    EXPORT    BACK

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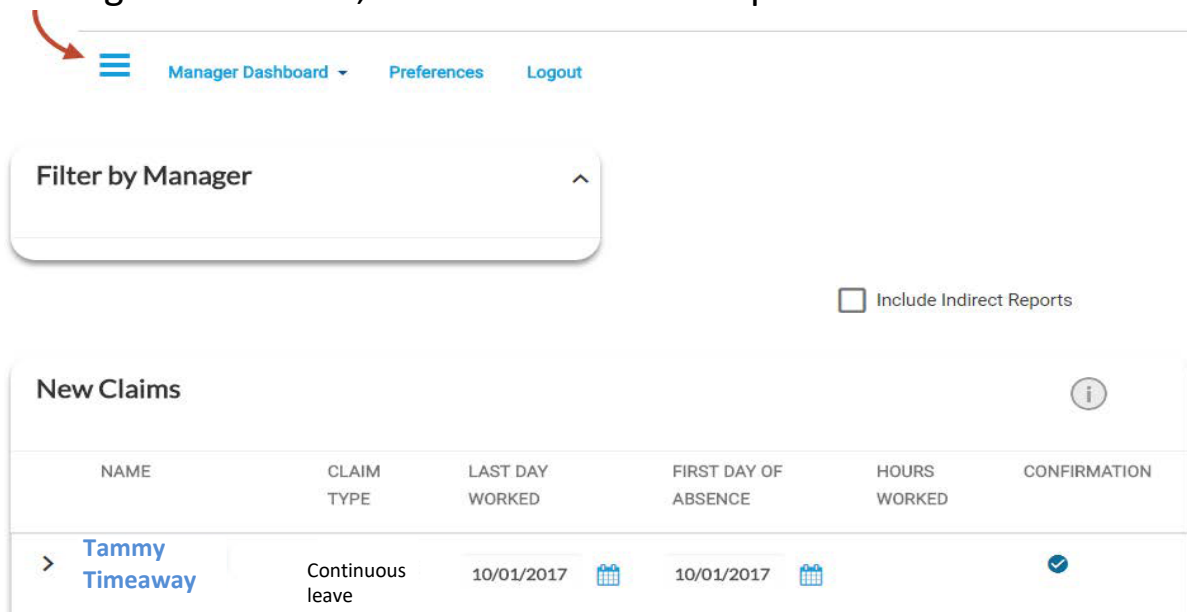
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# Manager Dashboard




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.



The screenshot shows the Manager Dashboard interface. At the top left, there is a hamburger menu icon (three horizontal blue lines) with a red arrow pointing to it. To its right are the text labels "Manager Dashboard", "Preferences", and "Logout". Below the menu icon is a "Filter by Manager" dropdown menu. To the right of the filter is a checkbox labeled "Include Indirect Reports". Below these elements is a section titled "New Claims" with an information icon (i) in the top right corner. The section contains a table with the following data:

NAME	CLAIM TYPE	LAST DAY WORKED	FIRST DAY OF ABSENCE	HOURS WORKED	CONFIRMATION
> Tammy Timeaway	Continuous leave	10/01/2017 	10/01/2017 		

- 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  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.



## Filter by Manager



navy

SEARCH

Last Name begins with navy ←

First Name begins with navy ←

Employee ID begins with navy ←

### Searching 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





Include Indirect Reports






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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

New Claims (i) x

NAME	EMPLOYEE ID	CLAIM NUMBER	LAST DAY WORKED	FIRST DAY OF ABSENCE	HOURS WORKED	DATE REPORTED TO SEDGWICK	CONFIRMATION
<a href="#">Black Blue</a>	900091082	Intermittent C105060900200001TC		04/06/2021 	1250.00 		

### Update the LDW/FDA

1. Click the calendar icon
2. Click the checkmark to confirm
3. Confirmation screen will pop up
4. Select Ok if correct/Back to change
5. Confirmation including summary of changes will appear

**Confirmation** x

Please confirm:

- ▶ **first day of absence of 04/06/2021**
- ▶ **hours worked 1250.00**

for **Intermittent C105060900200001TC** for **Black Blue**.

Select Back to edit or OK to update claim information.

← BACK
✓ OK

### 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

### Report a New Claim

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



### Report a New Claim

Need to report a new claim? You can start a new claim [clicking here](#).

[MORE](#)

Confirmation Number: 40211102B8C0001

Thank you

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.


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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.

**Notifications** 


NAME	NOTIFICATION
<a href="#">&gt; Tammy Timeaway</a>	<p><b>Continuous LOA - 1000000000000IFN</b>  <a href="#">Tammy Timeaway's</a> determination on their Continuous leave of absence will be made by 3/13/2019.</p>
<a href="#">&gt; Tammy Timeaway</a>	<p><b>Continuous LOA - 1000000000000IFN</b>  <a href="#">Tammy Timeaway's</a> Continuous leave of absence is currently pending.</p>







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

Employees Off Work			
NAME	CLAIM TYPE	FROM	TO
<a href="#">Mary Daglian</a>	Continuous	01/28/2019	04/01/2019
<a href="#">Janine Nicolosi</a>	Continuous	11/26/2018	04/15/2019
			<a href="#">MORE</a>



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

Confirm Return To Work 

NAME	CLAIM TYPE	RETURN TO WORK DATE	CONFIRM	EMPLOYEE HAS NOT RETURNED
Azure Bronze	Continuous LOA	11/30/2020 		



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.

### Search for an Employee

First Name  
**Tammy**

---

Last Name  
**Timeaway**



---


Employee ID

---

Claim Number

---

 **ADVANCED SEARCH**       **CLEAR**

 **SEARCH**





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**

NAME	EMPLOYEE ID	BEGIN DATE	CLAIM NUMBER	TYPE	SUBTYPE	STATUS	LEAVE BALANCE SUMMARY	DETAILS
<a href="#">Tammy Timeaway</a>	10455913	9/29/2021	<a href="#">4A2109AC9850001GI</a>	Employee Medical	Pregnancy	Approved - Approved		

### 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.

Hours  Days  Weeks

#### California Family Rights Act

Maximum(weeks): 12.00



#### Federal Family and Medical Leave Act

Maximum(weeks): 12.00



Used Pending Available

**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

**Helpful Hints:**

Edit Icon – only displays where Status = Pending Business Response



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Open Accommodations

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

- 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 x

---

Orange Aqua - [C103220900200003TCAR](#), Customer Service Manager, 03/22/2021

> Job Functions

---

> Accommodation Requests

---

⊗ CANCEL ✓ SAVE

---

> Approved Job Functions

BACK TO TOP



- 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  
 Adjust power production systems to meet load and distribution demands.

Is this a valid job Function?

Yes     No



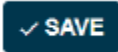
- Accommodation Requests: Applicable Accommodation Requests will be listed, select Approve/Reject
  - If answering “Reject” a text box will appear to enter in comments/clarifications

Accommodation Requests

START	END	TYPE	IMPACT	DESCRIPTION
1/11/2021	3/12/2021	Desk location	Temporary	test


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  your Leave Specialist is then notified of selections and the system will be updated along with the status in mySedgwick



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

## Communication Center

CONVERSATION THREADS

NEW MESSAGES

OPEN

Continuous LOA - 1000000000000IFN



### Helpful Hints

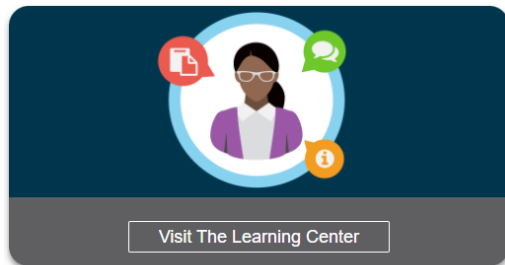
You can only see message threads sent by YOU!!



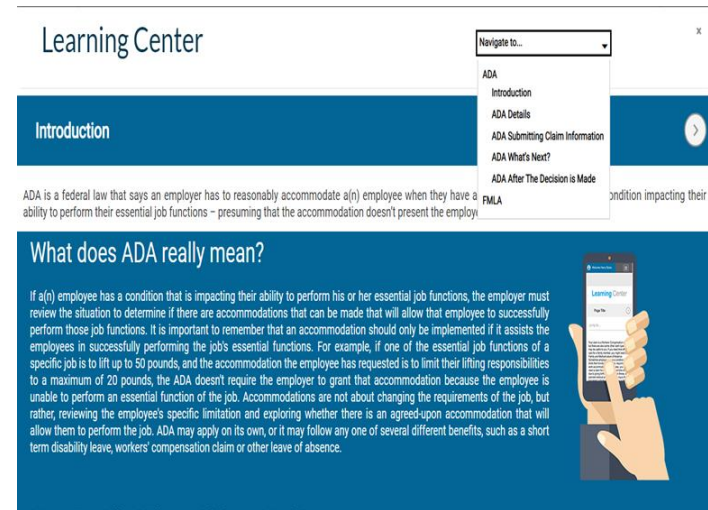
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The Learning Center is a document library offering information to assist and educate you throughout the claim process.

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.



	OPEN
FAQ and Training Documents	<input checked="" type="checkbox"/>
Helpful Links	<input checked="" type="checkbox"/>
Helpful Videos	<input checked="" type="checkbox"/>



### Additional information and helpful links from The Learning Center

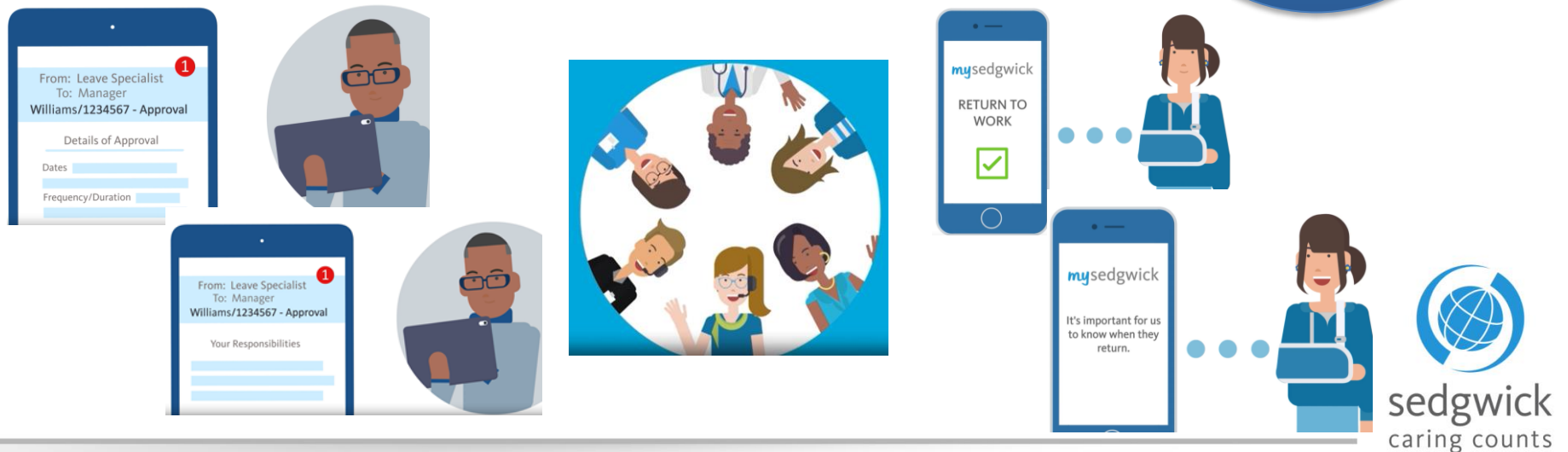
- FAQ /Training Documents and Helpful Link include Sedgwick Forms along with UCI Guides
- Helpful Videos will link you to educational videos to guide you through the claim process
  - Select open next to the applicable option



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- 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
    - You 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



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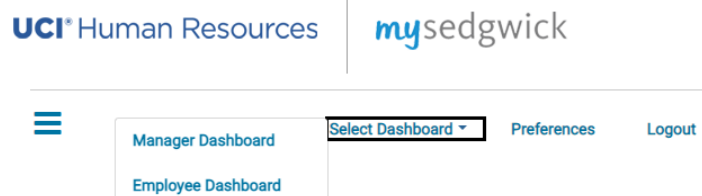
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# Employee Dashboard




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  
or
  - 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”

 You are viewing Orange Aqua's Employee Dashboard



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**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.

The screenshot shows a dashboard section titled "Tasks Needing Attention" with a notification badge of "2" and an expand/collapse arrow (^). Below the title are three task categories, each with a notification badge and a right-pointing arrow (>) to its left:

- NEW CLAIMS (0)
- > NOTIFICATIONS (2)
- CONFIRM RETURN TO WORK (0)

A vertical scrollbar is visible on the right side of the task list.



The screenshot displays a user interface for 'Tasks Needing Attention'. At the top, the title 'Tasks Needing Attention' is followed by a notification badge with the number '2' and an upward-pointing arrow. Below this, a section titled 'NOTIFICATIONS' is shown with a downward-pointing arrow on the left and a notification badge with '2' on the right. This section contains two items, both labeled '1. Continuous' and '2. Continuous'. Each item includes the name 'Tammy Timeaway' in blue text, followed by a description of their continuous leave and a specific date. The first item states the determination will be made by 3/13/2019, and the second states the anticipated return date is 4/16/2019. At the bottom of the notification list, there is a section titled 'CONFIRM RETURN TO WORK' with a notification badge showing '0'. A vertical scrollbar is visible on the right side of the notification list.

## Tasks Needing Attention 2 ^

▼ NOTIFICATIONS 2

**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 0


For more information about features on the Employee Dashboard, refer to the Employee Reference Guide.



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- 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

BEGIN DATE	TYPE	CLAIM NUMBER	STATUS	REPORT RETURN TO WORK	LEARNING CENTER
6/11/2021	Continuous LOA - Employee Medical	<a href="#">B710260191100001AA</a>	Open - Approved		



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## Activity Stream

- 11/22/2021**  
**C001220900200002TC**  
A determination on your Continuous leave of absence is due by Sedgwick by 2/12/2020.
- 11/1/2021**  
**C001220900200002TC**  
Your request for Continuous leave of absence has been approved.
- 9/27/2021**  
**C001220900200002TC**  
Your actual first day of absence on your Continuous leave of absence was reported as ...
- 9/12/2021**  
**301895129150001**  
Your benefits for Short Term Disability claim have ended due to return to work.

[MORE](#)

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



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- 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



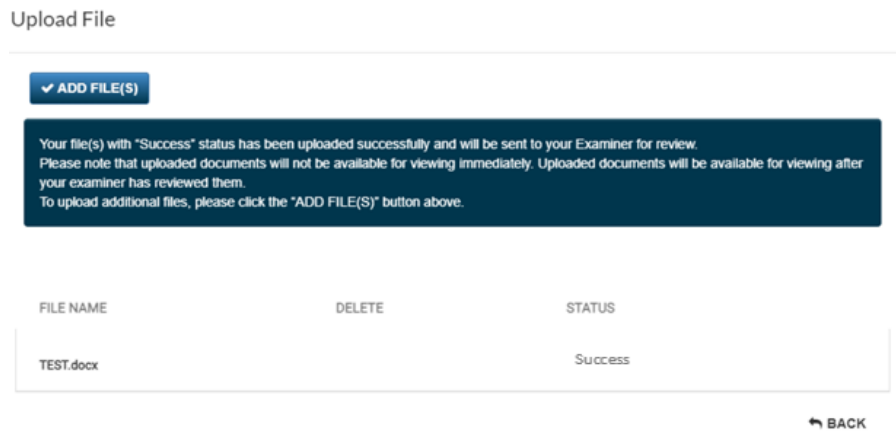
- Select “submit” which will populate a Confirmation Screen for you to confirm upload

### Confirmation

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

[← Cancel](#)
[OK](#)

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





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 of 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

**Claims Calendar**

< December 6 - December 12, 2020 >  Intermittent Absences Only

Sun 12/6	Mon 12/7	Tue 12/8	Wed 12/9	Thu 12/10	Fri 12/11	Sat 12/12
Short Term Disability						
	Continuous LOA	Continuous LOA	Continuous LOA	Continuous LOA	Continuous LOA	

● Approved     
 ● Pending     
 ● Waiting Period     
 ● Denied

i This calendar shows claims that involve time away from work.     
 EXPORT     
 MORE

**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

i This calendar displays time away from work related to the claim that you are viewing.



## Claims Calendar ✕

EXPAND/COLLAPSE



**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.



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Questions?

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Appendix

- 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

