



RIDGELINE GEAR CO.

Built for the Ascent & Engineered for Every Elevation

Standard Operating Procedures (SOPs) Leave Coordinator

Leave Administration:

FMLA, Colorado FAMLI, HFWA, ADA Intake, and Paid Leave

Effective Date: April 1, 2025

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Approved by: Daniel Whitfield, HR Director

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Contents

1. Overview	3
2. Company Description	3
3. Definitions & Vocabulary.....	4
4. Team & Contacts	6
5. Authority & Decision Limits	7
4. Tools, Files & Systems	9
4. Internal Communication: Slack Channels	10
6. Leave Types Handled	11
6. Intake & Triage Procedure.....	13
6. Priority Matrix	15
7. Deadlines, Calendar Rules & Clock Calculations	16
7. Service Level Agreement	20
8. FMLA Leave Procedure.....	21
9. Colorado FAMLI Procedure.....	30
9. ADA Accommodation Intake Procedure.....	33
10. Working With Managers	34
10. Benefits & Payroll Handoff.....	37
11. Colorado HFWA & Other Paid Leave.....	39
12. Intermittent Leave Tracking	45
12. Return-to-Work Procedure and Case Closure Checklist	47
12. Denials, Disputes & Escalations.....	48
12. Recurring Issues & Pattern Flags.....	50
13. Confidentiality & File Handling.....	52
13. Quality Controls	54
13. Email Housekeeping.....	55
13. Email Templates & Scripts	56

1. Overview

The purpose of this document is to outline the end-to-end process followed by the Ridgeline Gear Co. **Leave Coordinator** when handling employee requests for leave of absence, accommodation intake, and paid sick time. The Leave Coordinator is a junior position reporting to the Benefits Manager. This SOP must be read in full before handling any case independently.

In Scope

- Federal Family and Medical Leave Act (FMLA) leave requests
- Colorado Family and Medical Leave Insurance (FAMLI) coordination
- Colorado Healthy Families and Workplaces Act (HFWA) paid sick leave
- Americans with Disabilities Act (ADA) accommodation request intake only (all accommodation decisions are made by the HR Director)
- Company paid leave: PTO balance questions, bereavement leave, jury duty leave
- Intermittent leave tracking, return-to-work, and case closure
- Manager coordination and confidentiality compliance

Out of Scope

- Benefits open enrollment, elections, and qualifying life events
- 401(k), HSA, and FSA administration
- Short-term and long-term disability claims (notify the Benefits Manager; do not advise the employee)
- Workers' compensation claims (notify the Safety Coordinator; do not advise the employee)
- Payroll processing, tax withholding, and wage replacement calculations (route to the Payroll Lead)
- Non-Colorado employees (Ridgeline policy requires all employees to be Colorado residents; any exception is handled by the Benefits Manager directly)

Contact & Coverage

- Leaves inbox: leaves@ridgelinegear.com
- Escalations inbox: benefits@ridgelinegear.com
- Support hours: Monday – Friday, 8:00 am – 5:00 pm Mountain Time
- Closed on all Ridgeline-observed holidays (see Section 7)
- Emergency leave requests outside business hours: the employee contacts their manager directly, and the manager notifies the Leave Coordinator on the next business day

2. Company Description

Ridgeline Gear Co. is a specialty outdoor products manufacturer founded in 2003 and headquartered in Fort Collins, Colorado. The company designs and manufactures technical backpacks, climbing hardware, and performance outerwear for specialty retail and direct-to-consumer channels.

All operations are consolidated at a single Fort Collins campus: corporate offices, manufacturing floor, finished-goods warehouse, and a small on-site retail outlet. The company employs approximately 900 people, roughly 620 non-exempt production and warehouse workers, 250 exempt corporate staff, and 30 retail and facilities staff. All employees, including the small number of fully-remote workers, must be Colorado residents as a matter of company policy.

The HR department consists of the HR Director, a Benefits Manager, a Leave Coordinator (this role), two HR Generalists, a Payroll Lead, and a Safety & Workers' Comp Coordinator. General Counsel is provided on a shared basis from parent legal entity Ridgeline Holdings LLC.

The Leave Coordinator reports directly to the Benefits Manager. The Leave Coordinator is the first point of contact for all employee leave requests and is responsible for intake, eligibility determination, notices, tracking, and closure. The Leave Coordinator does not make accommodation decisions, denial decisions beyond clear ineligibility, or payroll determinations — see Section 5 for authority limits.

Ridgeline Leave — Contact Information

- Leaves email: leaves@ridgelinegear.com
- Escalations email: benefits@ridgelinegear.com
- Office hours: Monday – Friday, 8:00 am – 5:00 pm Mountain Time (MT)
- Closed: all company-observed holidays (Section 7)

3. Definitions & Vocabulary

The following terms are used throughout this document. A junior employee must understand every term before handling cases independently.

Term	Definition
ADA	Americans with Disabilities Act. Federal law requiring reasonable accommodation for qualified individuals with disabilities.
CDLE	Colorado Department of Labor and Employment. State agency enforcing Colorado labor laws including FMLI and HFWA.
Concurrent Designation	Designating a single leave event as covered by more than one law or policy simultaneously (e.g., FMLA and FMLI running together). Required whenever the same qualifying event triggers multiple applicable laws.
Continuous Leave	An uninterrupted leave from the first day through the last day of the approved period.
Designation Notice (WH-382)	The required written notice informing the employee whether their leave has been designated as FMLA-qualifying. Must be sent within 5

Term	Definition
	business days of the Leave Coordinator having sufficient information to make the determination.
DOL	U.S. Department of Labor. Federal agency enforcing FMLA.
Eligibility Notice (WH-381)	The required written notice informing the employee whether they are FMLA-eligible. Must be sent within 5 business days of the employee's leave request.
Eligible Employee (FMLA)	An employee who (1) has worked for Ridgeline for at least 12 months total (not necessarily consecutive), (2) has worked at least 1,250 hours in the 12 months immediately preceding the leave start date, and (3) works at a worksite with 50 or more employees within a 75-mile radius. At Ridgeline, criterion (3) is met by every employee because the entire workforce is at the Fort Collins campus.
Exempt / Non-Exempt	Under the FLSA, exempt employees are salaried and not entitled to overtime; non-exempt employees are paid hourly and entitled to overtime. For FMLA hours calculation: non-exempt hours come from hours_worked_log.xlsx; exempt hours are imputed at 40 hours per week unless actual timesheet data is on file.
FAMLI	Colorado Family and Medical Leave Insurance. State program providing up to 12 weeks of paid leave (16 in limited cases) for qualifying reasons. Administered by CDLE; the employer's role is coordination only, not wage replacement.
Fitness-for-Duty Certification	A medical provider's written statement confirming an employee can return to work, with or without restrictions. Required before return to work when the leave was taken for the employee's own serious health condition.
FMLA	Family and Medical Leave Act (federal). Provides up to 12 weeks of unpaid, job-protected leave in a rolling 12-month period for qualifying reasons; up to 26 weeks for military caregiver leave.
FTE	Full-Time Equivalent. A measure of employment status: 1.0 FTE = 40 hours per week; 0.5 FTE = 20 hours per week.
GINA	Genetic Information Nondiscrimination Act. Federal law restricting employer collection and use of genetic information, including family medical history.
HFWA	Colorado Healthy Families and Workplaces Act. Requires employers to provide up to 48 hours of paid sick leave per year for qualifying reasons.
Intermittent Leave	Leave taken in separate blocks of time for a single qualifying reason (e.g., physical therapy appointments, migraine episodes).
Key Employee	Under FMLA, a salaried employee in the top 10 percent of company earners who may, in limited circumstances, be denied job restoration.

Term	Definition
	Ridgeline rarely invokes this status; any key employee designation must be approved by the Benefits Manager.
Leave Year (Ridgeline)	Ridgeline uses the rolling 12-month period measured backward from the first day of any current FMLA leave use. See Section 8 for the calculation method.
LTD	Long-Term Disability. An insured benefit administered separately from FMLA/FAMLI. Out of scope for this SOP — route to Benefits Manager.
Medical Certification	A healthcare provider's written statement documenting a serious health condition, using DOL form WH-380-E (employee's own condition) or WH-380-F (family member's condition).
Reduced Schedule Leave	Leave that reduces an employee's normal daily or weekly work schedule (e.g., working 6 hours per day instead of 8).
Rights & Responsibilities Notice	A section of form WH-381 informing the employee of their FMLA rights and obligations. Must accompany the Eligibility Notice.
Rolling 12-Month Period	The FMLA leave year method used at Ridgeline: a 12-month period measured backward from the first day of any current FMLA leave use. Available FMLA hours are recalculated at every new use.
Serious Health Condition	Under FMLA, an illness, injury, impairment, or physical or mental condition that involves inpatient care or continuing treatment by a healthcare provider, as further defined in 29 CFR §825.113.
STD	Short-Term Disability. An insured benefit. Out of scope for this SOP — all STD questions are routed to the Benefits Manager.
USERRA	Uniformed Services Employment and Reemployment Rights Act. Federal law protecting the employment of military servicemembers.
WC	Workers' Compensation. State-administered insurance program for work-related injuries. Administered at Ridgeline by the Safety & Workers' Comp Coordinator; out of scope for this SOP.

3.1 Dates & Times

All times in this document are in Mountain Time (MT, UTC-7 standard time / UTC-6 daylight time). Fort Collins observes Daylight Saving Time. Use MM/DD/YYYY format in all date fields. When logging timestamps in leave_tracker.xlsx, use MM/DD/YYYY HH:MM MT.

Business days mean Monday through Friday, excluding Ridgeline-observed holidays listed in Section 7. Calendar days include weekends and holidays. This distinction is critical for FMLA notice clocks — the Eligibility Notice and Designation Notice each use a 5-business-day clock, but the medical certification return window uses a 15-calendar-day clock. See Section 7.

4. Team & Contacts

The email domain is ridgelinegear.com unless otherwise noted. Slack handles follow the format @firstname.lastname unless otherwise noted.

Role	Name	Email	Slack
HR Director	Daniel Whitfield	daniel.whitfield@ridgelinegear.com	@daniel.whitfield
Benefits Manager (direct supervisor)	Renata Okafor	renata.okafor@ridgelinegear.com	@renata.okafor
Leave Coordinator (this role)	[You]	leaves@ridgelinegear.com	@leaves-hr
HR Generalist – Employee Relations	Meera Patel	meera.patel@ridgelinegear.com	@meera.patel
HR Generalist – Onboarding	Jordan Briggs	jordan.briggs@ridgelinegear.com	@jordan.briggs
Payroll Lead	Teresa Vang	teresa.vang@ridgelinegear.com	@teresa.vang
Safety & Workers' Comp Coordinator	Luis Arredondo	luis.arredondo@ridgelinegear.com	@luis.arredondo
General Counsel (Ridgeline Holdings LLC)	Evelyn Marchetti	evelyn.marchetti@ridgelineholdings.com	@evelyn.marchetti
IT Access Manager	Samir Haddad	samir.haddad@ridgelinegear.com	@samir.haddad

5. Authority & Decision Limits

The Leave Coordinator's role has tightly scoped decision authority. Any decision outside the limits below requires written approval from the listed authority BEFORE any communication with the employee or manager. **When in doubt, escalate.**

5.1 Decisions the Leave Coordinator may make independently

- Determine FMLA eligibility based on the three eligibility criteria (Section 8) when all required data is available in employee_roster.xlsx and hours_worked_log.xlsx.
- Send the FMLA Eligibility Notice (WH-381).

- Send the FMLA Designation Notice (WH-382) when the certification is complete and sufficient.
- Request medical certification using WH-380-E or WH-380-F.
- Calculate the rolling 12-month FMLA balance per Section 8.
- Log leave usage in leave_tracker.xlsx, leave_history.xlsx, and famli_coordination_log.xlsx.
- Answer employee questions about PTO and HFWA balances using the trackers.
- Acknowledge receipt of ADA accommodation requests and route to the HR Director.
- Close out completed continuous leave cases where the employee returns on the scheduled return date with no outstanding issues.
- Deny FMLA leave on the basis of clear ineligibility only (e.g., employee has been employed less than 12 months or has worked less than 1,250 hours in the preceding 12 months).

5.2 Decisions requiring Benefits Manager approval (Renata Okafor)

- Determining whether a medical certification is "incomplete" versus "insufficient." FMLA distinguishes between these, and the required employer response differs.
- Any FMLA or FAML I denial other than clear ineligibility as described in 5.1.
- Intermittent leave pattern concerns, suspected abuse, or a pattern inconsistent with the certified frequency.
- Any leave extension request beyond the 12-week cap (or 26-week cap for military caregiver leave).
- Key Employee designations.
- HFWA classification disputes, e.g., whether a stated reason qualifies under HFWA.
- Retroactive leave designation requests.
- Any non-exempt case where hours_worked_log.xlsx data is incomplete or in dispute.
- FAML I concurrent designation where the FAML I and FMLA qualifying reasons appear to diverge.

5.3 Decisions requiring HR Director approval (Daniel Whitfield)

- All ADA accommodation decisions. The Leave Coordinator's intake role is limited to receipt, acknowledgment, and routing; the HR Director owns the interactive process.
- Fitness-for-duty certification disputes, e.g., the provider clears the employee with restrictions that Ridgeline cannot accommodate.
- Failure-to-return-to-work cases.
- Any case where discipline, demotion, or termination is being contemplated during, immediately after, or in connection with a leave.

5.4 Decisions requiring General Counsel (Evelyn Marchetti)

- Any employee communication mentioning an attorney, the EEOC, the CDLE, the DOL, the Colorado Civil Rights Division, or a lawsuit.
- Retroactive leave designation where the employee is disputing prior attendance discipline.

- Any GINA-related concern, e.g., a medical certification that contains genetic or family medical history information beyond what was requested.
- Any case where the employee is simultaneously involved in active litigation with Ridgeline.

5.5 Actions the Leave Coordinator must NEVER take

- Disclose any employee medical information to the employee's manager, coworkers, or any third party beyond the minimum necessary for administering the leave (e.g., dates of absence are permitted; the nature of the medical condition is not).
- Promise retroactive leave designation.
- Confirm or deny whether an employee is on any type of leave to an external caller, vendor, reference-check request, or anyone outside the HR team.
- Discuss one employee's leave with another employee, even if they share a manager.
- Issue, modify, or approve any payroll transaction.
- Store medical certifications or any document containing protected health information in any location other than (restricted access).
- Include medical details, diagnoses, or protected health information in any email, Slack message, or shared document.

4. Tools, Files & Systems

Verify all information from the sources below before responding. Do not rely on memory. All files are located on the unless otherwise noted.

Source	Contents	When to Use
employee_roster.xlsx	Master active-employee list: Employee ID, Full Name, Work Email, Personal Email, Hire Date, FTE, Job Title, Department, Work Location, Manager Name, Manager Email, Exempt/Non-Exempt, Union Status, Residence State.	All intake steps (employee identity verification); FMLA eligibility (tenure check); manager contact lookup.
hours_worked_log.xlsx	Rolling 12-month hours worked, by employee, updated every Monday by Payroll. Non-exempt hours are actual; exempt hours are imputed at 40 hours per week unless a timesheet is on file.	FMLA 1,250-hour eligibility test (Section 8).
leave_tracker.xlsx	Active and recently closed leave cases: Case ID, Employee ID, Leave Type(s), Start Date, Expected End Date, Actual End Date, Continuous/Intermittent, Hours/Days Used, Rolling Balance, Medical Cert Status, Manager Notified (Y/N/Date), Case Status, Notes.	Every case — open, update at every step, close.

Source	Contents	When to Use
leave_history.xlsx	Historical leave usage per employee for the prior 24 months: Case ID, Employee ID, Leave Type, Start Date, End Date, Hours Used, Reason Category.	Rolling 12-month FMLA balance calculation (Section 8); pattern identification (Section 12).
famli_coordination_log.xlsx	FAMLI claim coordination: Employee ID, FAMLI Claim ID, Claim Start Date, Claim Status, Concurrent FMLA Case ID, Employer Response Status.	All FAMLI-qualifying leave cases (Section 9).
hfwa_balance_tracker.xlsx	HFWA sick leave accrual and usage per employee: Employee ID, YTD Accrued, YTD Used, Current Balance, Last Accrual Date.	HFWA sick leave requests (Section 11); balance inquiries; reclassification checks.
(PDF folder)	Blank DOL and Colorado forms: WH-380-E, WH-380-F, WH-381, WH-382, WH-384, WH-385, CO_FAMLI_Employee_Notice.pdf, CO_HFWA_Notice.pdf, Ridgeline_Leave_Policy.pdf.	Attach to employee notices per the relevant procedure. Never modify the blank forms; save completed forms to the employee's medical file folder.
(Word folder)	All approved email and letter templates referenced in Section 13.	Every employee and manager communication.
(PDF folder, restricted access)	Completed medical certifications, fitness-for-duty notes, ADA intake forms. Access restricted to HR Director, Benefits Manager, and Leave Coordinator.	Filing only. Never attach any file from this folder to any outgoing email or post its contents in any Slack channel.
Google Calendar — "HR Leave Deadlines"	All active case deadlines: eligibility notice due, designation notice due, certification return due, scheduled return-to-work dates, intermittent leave review dates.	Add an event at every step that creates a new deadline (see Section 7).

4. Internal Communication: Slack Channels

All internal communications about leave cases must use the designated Slack channels below. Direct messages are not permitted for case-related communication because they cannot be audited.

Channel	When to Use
#leave-intake	Primary Leave Coordinator channel. All routine case notifications: new intake confirmations, eligibility decisions, certification status, scheduled return-to-work reminders. Default channel when uncertain which to use.
#benefits-team	Benefits team coordination. Questions to the Benefits Manager (Renata Okafor) and coordination on cases touching multiple benefits areas.
#hr-escalations	Escalations requiring HR Director attention (Daniel Whitfield): denials beyond clear ineligibility, failure-to-return cases, pattern flags per Section 12, any case where discipline is being contemplated.
#payroll-coordination	Payroll handoffs only. Notify the Payroll Lead (Teresa Vang) of leave start dates, leave end dates, transitions to unpaid status, and return-to-work dates. Do not post non-payroll-related case information here.
#legal-review	General Counsel attention (Evelyn Marchetti): legal threats, EEOC/CDLE/DOL mentions, retroactive designation disputes, GINA concerns, any case involving active litigation.
#unknown-senders-hr	Any leave-related email from a sender not found in employee_roster.xlsx: former employees, applicants, personal contacts of employees, misdirected emails, general inquiries.

Never post medical details, diagnoses, or any protected health information in any Slack channel under any circumstances. Case notifications should reference only the Case ID from leave_tracker.xlsx and the minimum case metadata needed for the intended audience, never the nature of the medical condition.

6. Leave Types Handled

The table below summarizes every leave type within the Leave Coordinator's scope. A single leave event frequently triggers multiple types simultaneously, for example, an employee's own serious health condition can trigger FMLA, FAMILI, HFWA, and PTO substitution at the same time. When multiple types apply, concurrent designation is required. See Sections 6 and 9.

Leave Type	Governing Law / Policy	Eligibility	Paid?	Max Duration	Initial Deadline / SOP Section
FMLA	Federal (29 USC §2601)	12 months tenure + 1,250 hours worked in prior 12 months + 50-employee/75-mile worksite (all Ridgeline employees meet #3)	No	12 weeks per rolling 12-month period (26 weeks for military caregiver)	Eligibility Notice within 5 business days — Section 8
CO FMLI	Colorado (C.R.S. 8-13.3-501)	Earned at least \$2,500 in wages in the base period (prior 4 of 5 quarters)	Yes (paid by CDLE)	12 weeks (16 weeks for pregnancy complications)	Employer response to CDLE within 5 business days — Section 9
ADA Accommodation (intake only)	Federal (42 USC §12101)	Qualified individual with a disability	N/A	N/A (not leave)	Same-day acknowledgment; route to HR Director — Section 9
HFWA Sick Leave	Colorado (C.R.S. 8-13.3-401)	All employees from day 1; accrues 1 hour per 30 hours worked	Yes	48 hours per calendar year; 48-hour balance cap	No advance notice required — Section 11
Company PTO	Ridgeline Handbook §4.2	All benefited employees (≥ 0.5 FTE); accrues day 1	Yes	200-hour balance cap	Manager approval; 2 weeks notice requested for foreseeable use — Section 11
Bereavement Leave	Ridgeline Handbook §4.5	All benefited employees	Yes	3 days immediate family / 1 day extended family	Documentation within 30 calendar days of loss — Section 11
Jury Duty Leave	Colorado law + Handbook §4.6	All employees	Yes (regular wages less jury pay)	Length of service	Summons to HR within 2 business days of receipt — Section 11

Leave Type	Governing Law / Policy	Eligibility	Paid?	Max Duration	Initial Deadline / SOP Section
USERRA / Military	Federal (38 USC §4301)	All military servicemembers	No (pay differential per policy)	Up to 5 years cumulative	Advance notice unless military necessity — escalate; Section 11
Personal Unpaid Leave	Ridgeline Handbook §4.8	Benefited employees; discretionary approval	No	Up to 30 calendar days; extensions rare	Manager + HR Director approval — escalate; Section 11

Short-term disability (STD), long-term disability (LTD), and workers' compensation (WC) are outside this SOP's scope. STD and LTD questions are routed to the Benefits Manager. WC questions are routed to the Safety & Workers' Comp Coordinator. However, the Leave Coordinator must still designate and track FMLA/FAMLI for any qualifying leave that also involves STD or WC, because these laws may run concurrently.

6. Intake & Triage Procedure

Every incoming leave-related email or Slack message must be triaged before any other action. Emails originating from internal HR team members or from Payroll are exempt from the sender verification step (Step 1) but still follow all other steps.

6.1 Triage Steps

Perform the following steps in order. Do not skip steps even if they appear obvious for a particular case.

- **Step 1:** Verify the sender is an active employee in employee_roster.xlsx. Match on email address, not display name. If the sender is not found, post to #unknown-senders-hr using the format: UNRECOGNIZED SENDER: [Sender Name], [Sender Email], [Subject Line], and forward the email to the Benefits Manager (Renata Okafor). Do not reply to the sender until instructed by the Benefits Manager.
- **Step 2:** Confirm the sender is writing about their own leave. If the sender is a manager asking about a direct report's leave, follow Section 10 (Working With Managers) instead of this procedure. If the sender is another HR team member, respond per the internal request.
- **Step 3:** Identify every leave type that may apply to the request using the Section 6 comparison table. A single request frequently triggers multiple leave types (see Section 6).
- **Step 4:** Open leave_tracker.xlsx and search for any existing open case for this employee. If an open case exists, determine whether the new message is (a) a continuation of the open case, (b) a new case on top of an existing one (e.g., a new medical event during an intermittent leave), or (c) a duplicate. Update the existing case or open a new Case ID accordingly.

- **Step 5:** Open leave_history.xlsx and review the employee's leave usage in the prior 12 months. This is required for FMLA rolling balance calculations (Section 8) and for pattern identification (Section 12).
- **Step 6:** Verify that the minimum intake data per Section 6 is present. If any required field is missing, reply to the employee requesting the missing information before opening the case. Do not guess or infer missing data.
- **Step 7:** Assign a priority level per the Priority Matrix in Section 6.
- **Step 8:** If a new case is needed, open a Case ID in leave_tracker.xlsx with all applicable leave types, the priority, and the minimum intake data.
- **Step 9:** Act per the relevant section of this SOP for each applicable leave type. Use the designated email template from Section 13.
- **Step 10:** Post a case notification to the relevant Slack channel per Section 4.
- **Step 11:** Add any new deadlines (eligibility notice due, certification return due, scheduled return-to-work date, etc.) to the HR Leave Deadlines Google Calendar per Section 7.
- **Step 12:** Complete email housekeeping per Section 13.

6.2 Minimum Intake Data

Before opening a case in leave_tracker.xlsx, confirm that the following fields are available. Do not guess or infer missing data. Do not ask the employee for any medical detail beyond the reason category.

- Employee identity: full name and Employee ID, both confirmed against employee_roster.xlsx.
- Requested leave start date (or the date leave began, if the employee is requesting retroactive designation, see Section 5.2).
- Requested leave end date or expected duration ("unknown / ongoing" is acceptable).
- Reason category only, select from: (a) employee's own serious health condition; (b) family member's serious health condition; (c) bonding with a new child (birth, adoption, or foster placement); (d) qualifying exigency (military family); (e) military caregiver; (f) bereavement; (g) jury duty; (h) military service; (i) other. Do not ask for and do not record medical diagnoses at intake.
- Continuous, intermittent, or reduced schedule leave, if known.
- Whether the need is foreseeable (30+ calendar days advance notice possible) or unforeseeable.
- Manager name (retrieve from employee_roster.xlsx if the employee does not state it).
- Contact preference during leave (work email, personal email, or phone).
- Any supporting documentation attached to the request.

If fewer than 5 of the above fields are available from the initial message, reply using Template 1 and do not open a case until the minimum data is complete. If only the employee identity and start date are present, that is enough to open a case for acknowledgment only, as long as the acknowledgment email also requests the missing fields.

6.3 Multi-Leave-Type Requests

Most serious leave requests trigger more than one type simultaneously. When this happens:

- Open ONE Case ID in leave_tracker.xlsx with all applicable leave types listed in the "Leave Type(s)" column.
- Handle each applicable type per its relevant section of this SOP.
- Send one consolidated acknowledgment email to the employee, not separate emails for each leave type.
- Apply the highest priority level of any individual component to the whole case for SLA purposes (Section 7).
- Concurrent designation is the DEFAULT whenever two or more leave types cover the same event. For example, an employee's own serious health condition almost always triggers both FMLA and FAMILI; these must run concurrently. See Section 9.

Common multi-type combinations:

- Employee's own serious health condition: FMLA + FAMILI + possibly HFWA + possibly PTO substitution.
- Birth and bonding: FMLA + FAMILI + PTO.
- Family member's serious health condition: FMLA + FAMILI.
- Intermittent medical appointments: FMLA + possibly HFWA for specific appointment days.
- Work-related injury: workers' compensation (routed to the Safety Coordinator) + possibly FMLA + possibly FAMILI. The Leave Coordinator handles the FMLA/FAMILI designation; the Safety Coordinator handles the WC claim.

6.4 Replies to Previous Emails

Treat every reply as a new message requiring triage, even if it is part of a long thread. Read the prior context in the case notes, but do not assume prior actions are complete. Check leave_tracker.xlsx for the current case status. If the reply contains new information, such as a returned certification, a date change, a new qualifying event, or a new question, update the case accordingly and follow the relevant procedure. Do not re-send templates that have already been sent in the thread; reference the prior notice by date and subject line instead.

6. Priority Matrix

Every case must be assigned a priority at intake (Step 7 of Section 6). Priority drives the internal response-time SLA in Section 7. Note that any statutory deadline under Section 7 always supersedes the internal SLA. If an Eligibility Notice is due tomorrow but the case would otherwise be P4, the statutory deadline wins.

Priority	Description	Examples
P1 — Urgent	Requires same-business-day action. Any case where a statutory deadline expires today or tomorrow, any case involving a legal threat, any case involving potential job abandonment, or any case involving an employee who	Employee hospitalized and will miss next scheduled shift with no prior leave case open; bereavement for immediate family; active military orders with less than 72 hours notice; FMLA Eligibility Notice due today or tomorrow; medical certification 15-calendar-day window expires today; email mentions attorney, EEOC, or CDLE;

Priority	Description	Examples
	is currently unable to work and has no open leave case.	manager reports an employee has been out 3 or more consecutive days without notice; ADA request where the employee states they cannot perform essential functions as of today.
P2 — High	Requires action within 1 business day. Foreseeable leaves submitted without the full 30-day notice, approaching but not imminent deadlines, patterns requiring review, and urgent accommodation requests.	Foreseeable FMLA or FAMILI request submitted with less than 30 days notice; fitness-for-duty certification required for a return scheduled within the next 2 business days; medical certification 15-calendar-day window expires in 1 to 2 days; pattern flag case per Section 12; ADA accommodation request with stated urgency but not immediate; intermittent leave absences occurring noticeably above certified frequency.
P3 — Standard	Requires action within 2 business days. Routine leave administration and standard case updates.	Standard foreseeable FMLA or FAMILI request with 30+ days notice; routine intermittent leave absence log; HFWA sick leave request with complete information; PTO, bereavement, or jury duty question with documentation provided; routine case updates; routine certification receipts; standard medical certification request.
P4 — Low	Requires action within 3 business days. Informational requests that do not directly affect a statutory clock.	Balance inquiries (PTO, HFWA, FMLA remaining); general policy questions (direct to the Ridgeline Leave Policy PDF); document requests (copy of prior notice, policy document); compliments and feedback.

7. Deadlines, Calendar Rules & Clock Calculations

Leave administration is deadline-driven. Missing a statutory deadline can expose Ridgeline to liability and can grant the employee rights they would not otherwise have. The Leave Coordinator must know the difference between business days and calendar days, must know when each clock starts, and must log every deadline in the HR Leave Deadlines Google Calendar at the moment it is triggered.

7.1 Business Days vs. Calendar Days

This distinction is critical.

- Business day: Monday through Friday, excluding Ridgeline-observed holidays listed in Section 7. A day on which the HR office is closed is NOT a business day.
- Calendar day: every day of the week, including Saturday, Sunday, and holidays.

Which rule uses which clock:

- FMLA Eligibility Notice: 5 BUSINESS days.
- FMLA Designation Notice: 5 BUSINESS days.
- FAML I employer response to CDLE: 5 BUSINESS days.
- Medical certification return window: 15 CALENDAR days.
- Incomplete certification cure window: 7 CALENDAR days.
- Bereavement documentation: 30 CALENDAR days.
- Jury duty summons submission: 2 BUSINESS days.

7.2 When Each Clock Starts

- Eligibility Notice clock: starts on the calendar date of the employee's leave request. Even if the request arrives after business hours or on a weekend, Day 0 is that calendar date and Day 1 is the next business day.
- Designation Notice clock: starts on the calendar date the Leave Coordinator has "sufficient information" to determine whether the leave qualifies — typically the date a complete medical certification is received. If the certification is incomplete or insufficient, the clock pauses while the employee is given 7 calendar days to cure.
- Medical certification return clock: starts on the calendar date the employee receives the request. For an email sent during business hours (before 5:00pm MT on a business day), presume same-day receipt. For an email sent after 5:00pm MT or on a non-business day, presume receipt on the next business day.
- FAML I employer response clock: starts on the calendar date Ridgeline receives the CDLE notice of the employee's FAML I claim via email at famli-employer@ridgelinegear.com. The email's Date header timestamp governs.

7.3 Counting Business Days

Business days run continuously from Monday through Friday (excluding Sunday and Saturday), excluding Ridgeline-observed holidays listed in Section 7. A day on which the HR office is closed is NOT a business day.

7.4 Counting Calendar Days

Calendar days run continuously, including weekends and holidays.

7.5 Deadline Matrix

The table below lists every routine deadline the Leave Coordinator is responsible for. Every deadline created by a case must be added to the HR Leave Deadlines Google Calendar as a separate event at the moment the triggering action occurs.

Trigger	Deadline	Clock Type	Owner (Form)	Consequence if Missed
Employee submits FMLA leave request	5 days	Business	Leave Coordinator (WH-381)	Employee may be entitled to leave as if eligible; potential DOL liability.

Trigger	Deadline	Clock Type	Owner (Form)	Consequence if Missed
Leave Coordinator receives complete medical certification	5 days	Business	Leave Coordinator (WH-382)	Leave is automatically treated as FMLA-qualifying regardless of actual qualification.
Leave Coordinator requests medical certification from employee	15 days	Calendar	Employee (WH-380-E or WH-380-F)	Leave may be denied; escalate to Benefits Manager.
Employee notified certification is incomplete	7 days to cure	Calendar	Employee	Cert may be treated as insufficient; escalate to Benefits Manager.
CDLE issues FAML I claim notice to Ridgeline	5 days	Business	Leave Coordinator (FAML I Employer Response)	Ridgeline loses right to contest; FAML I claim proceeds as filed.
Employee submits ADA accommodation request	Same day	N/A	Leave Coordinator → HR Director	Potential ADA liability; route to HR Director immediately.
Employee returns from FMLA for own serious health condition	Day of return	N/A	Employee (fitness-for-duty cert)	Employee may not return to duty until cert received; escalate to HR Director.
Active intermittent leave case review	Every 30 days	Calendar	Leave Coordinator	Pattern issues may not be detected; update recurring issue log (Section 12).
Employee requests bereavement leave	30 days from loss	Calendar	Employee (obituary or death certificate)	Leave may be reclassified as PTO.
Employee receives a jury summons	2 days	Business	Employee (jury summons)	Leave may be reclassified as PTO.

7.6 Ridgeline-Observed Holidays — 2025

On the dates below, the HR office is closed, Ridgeline observes the holiday, and the day does NOT count as a business day for any FMLA, FAMILI, or internal SLA clock. Calendar-day clocks continue to run through holidays.

Holiday	2025 Date
New Year's Day	Thursday, 01/01/2025
Martin Luther King Jr. Day	Monday, 01/20/2025
Presidents' Day	Monday, 02/17/2025
Memorial Day	Monday, 05/26/2025
Juneteenth	Friday, 06/19/2025
Independence Day (observed)	Friday, 07/04/2025
Labor Day	Monday, 09/01/2025
Thanksgiving Day	Thursday, 11/26/2025
Day after Thanksgiving	Friday, 11/27/2025
Christmas Eve	Thursday, 12/24/2025
Christmas Day	Friday, 12/25/2025

7. Service Level Agreement

The internal SLA defines how quickly the Leave Coordinator must respond to a case once it has been assigned a priority level per Section 6. The SLA is a floor, not a ceiling — cases should be handled as promptly as workload allows.

7.1 Response Time Targets by Priority

- P1 — Urgent: same business day. Acknowledgment and initial action must occur before close of business (5:00pm MT) on the business day the case is received. If a P1 case arrives after 3:00pm MT, initial action must still occur the same business day; full resolution may carry into the next business day.
- P2 — High: within 1 business day of receipt.
- P3 — Standard: within 2 business days of receipt.
- P4 — Low: within 3 business days of receipt.

7.2 Statutory Deadlines Always Supersede Internal SLA

Any statutory deadline from the Section 7 Deadline Matrix overrides the internal SLA. If a case is P4 by normal priority but the FMLA Eligibility Notice is due tomorrow, the statutory deadline wins and the case must be handled today. When a statutory deadline and an internal SLA conflict, always act on the earlier of the two.

7.3 SLA Clock Rules

- SLAs are measured from the earlier of (a) the email timestamp or (b) the Case ID creation time in leave_tracker.xlsx.
- SLAs pause on weekends and Ridgeline-observed holidays — internal SLAs use business days only.
- For a multi-type request, the SLA is set by the highest-priority component and applies to the whole case.
- If a case is awaiting a response from the employee (e.g., medical certification has been requested), the internal SLA pauses but the statutory clock continues. Document the pause in the case notes with the date and reason.

7.4 SLA Breaches and Near-Breaches

- If a case has reached 50% of its SLA window without substantive action, post an alert to #benefits-team using the format: SLA WARNING: Case [Case ID], [Priority], [Current Status], [Time Remaining].
- If a case breaches its SLA, log the breach in leave_tracker.xlsx with a note ("SLA breach: [reason]"), post to #benefits-team, and continue handling the case on a priority basis.
- If a case breaches BOTH its internal SLA and a statutory deadline from Section 7, immediately escalate to the Benefits Manager via #benefits-team AND forward the employee email thread to renata.okafor@ridgelinegear.com with subject line "STATUTORY DEADLINE BREACH — Case [Case ID]". Do not communicate with the employee about the breach until directed by the Benefits Manager.

8. FMLA Leave Procedure

This section describes the end-to-end procedure for handling FMLA leave requests. FMLA is the most complex leave type the Leave Coordinator administers. It has strict eligibility thresholds, strict notice deadlines, a rolling-balance calculation, and an incomplete-versus-insufficient certification distinction. Follow this section carefully. When in doubt, escalate per Section 5.

8.1 Eligibility Determination

An employee is FMLA-eligible only if all three of the following criteria are met:

- Criterion 1 — Tenure: the employee has been employed by Ridgeline for at least 12 months, total (not necessarily consecutive). Breaks in service longer than 7 years do not count toward tenure unless the break was due to military service or a written agreement between Ridgeline and the employee.
- Criterion 2 — Hours: the employee has worked at least 1,250 hours for Ridgeline in the 12 months immediately preceding the requested leave start date.
- Criterion 3 — Worksite: the employee works at a worksite with at least 50 employees within a 75-mile radius. All Ridgeline employees automatically meet this criterion because the entire workforce is at the Fort Collins campus.

Procedure:

- Step 1. Open employee_roster.xlsx and locate the employee by Employee ID.

- Step 2. Calculate total tenure from Hire Date through the requested leave start date. If total tenure is less than 12 months, the employee is NOT eligible — skip to Step 6.
- Step 3. Open hours_worked_log.xlsx and locate the employee's rolling 12-month hours value as of the requested leave start date. For all employees — non-exempt and exempt — use the value shown in the file directly. The file already contains actual hours for non-exempt employees and pre-imputed hours (40 hours per week of employment) for exempt employees without a timesheet on file. Do NOT recalculate or impute hours yourself. If you suspect the file value may be inaccurate (e.g., the employee took extended unpaid leave during the prior 12 months that may not be reflected in the imputed value), escalate to the Benefits Manager per Section 5.2 before issuing the Eligibility Notice.
- Step 4. If hours worked in the preceding 12 months is less than 1,250, the employee is NOT eligible — skip to Step 6.
- Step 5. Criterion 3 is automatically met. If Criteria 1 and 2 are also met, the employee IS eligible. Proceed to Section 8 (notices).
- Step 6. If any criterion is not met, the employee is NOT eligible. Proceed to Section 8 (denials).
- The employee may still be eligible for Colorado FAMLI even though he is not eligible for FMLA — FAMLI has no tenure requirement. See Section 9 before closing the case.

8.2 Rolling 12-Month Period Calculation

Ridgeline uses the rolling 12-month leave year measured backward from the first day of any current FMLA leave use.

Formula:

- Total FMLA entitlement = employee's regular workweek hours × 12 weeks.
- For a 1.0 FTE employee (40 hours per week): $40 \times 12 = 480$ hours per rolling year.
- For a 0.75 FTE employee (30 hours per week): $30 \times 12 = 360$ hours per rolling year.
- For a 0.5 FTE employee (20 hours per week): $20 \times 12 = 240$ hours per rolling year.
- Military caregiver leave uses a 26-week entitlement (workweek hours × 26) in a single 12-month period, not rolling.

Procedure:

- Step 1. From employee_roster.xlsx, determine the employee's FTE and calculate the regular workweek hours ($FTE \times 40$).
- Step 2. Calculate total FMLA entitlement = regular workweek hours × 12.
- Step 3. Open leave_history.xlsx. Filter by Employee ID and Leave Type = FMLA.
- Step 4. Sum FMLA hours used where the leave date falls within the 12 months preceding the requested start date (from start_date minus 12 months through start_date minus 1 day, inclusive).
- Step 5. Available FMLA hours = total entitlement – hours used in the rolling window.
- Step 6. If available hours is less than the requested leave duration, the employee will exhaust FMLA entitlement during the requested period. Approve up to the available

balance only. Any request to extend beyond the available balance must be escalated to the Benefits Manager per Section 5.2.

- Case LC-2025-0142: continuous FMLA 06/15/2025–06/29/2025, 80 hours used.
- Case LC-2025-0331: intermittent FMLA (certified for migraines) during 09/01/2025–12/31/2025, 48 hours used.
- Case LC-2025-0058: intermittent FMLA (same certification, continued) during 01/01/2025–03/31/2025, 32 hours used.
- Total FMLA hours used in the lookback window: $80 + 48 + 32 = 160$ hours.
- Step 5: Available FMLA hours as of 04/20/2025 = $480 - 160 = 320$ hours.
- Step 6: If Sarah requests a continuous 12-week (480-hour) leave, she will exhaust available entitlement at 320 hours (8 weeks) and cannot use the full 12 weeks. Approve up to 320 hours. Any extension request must be escalated to the Benefits Manager.

Leave hours used INSIDE the lookback window count against the balance regardless of which case they belong to. A new FMLA case does not reset the rolling balance.

8.3 FMLA Qualifying Reasons

The following reasons qualify for FMLA leave. The reason category determines which certification form is used (if any) and which leave-duration limits apply.

Qualifying Reason	Description	Typical Certification Form
Employee's own serious health condition	An illness, injury, impairment, or physical or mental condition that involves inpatient care or continuing treatment by a healthcare provider. Further defined in 29 CFR §825.113.	WH-380-E
Family member's serious health condition	Same medical standard, applied to the employee's spouse, parent, or child. "Child" under FMLA includes a child under 18, or an adult child incapable of self-care due to a disability. "Parent" includes in loco parentis relationships.	WH-380-F
Bonding with a new child	Birth of the employee's child, placement of a child for adoption, or placement of a child in foster care. Must be taken within 12 months of the qualifying event.	None (no medical certification)
Qualifying exigency	Specific needs arising from a family member's covered military service (e.g., short-notice deployment, childcare, post-deployment activities).	WH-384
Military caregiver	Caring for a covered servicemember with a serious injury or illness incurred in line of duty.	WH-385

Qualifying Reason	Description	Typical Certification Form
	Provides up to 26 weeks in a single 12-month period — not rolling.	

Important definitional notes:

- "Parent" under FMLA includes in loco parentis relationships. If an employee claims a parent relationship with someone who is not a biological or adoptive parent, verify the in loco parentis claim is documented. When uncertain, escalate to the Benefits Manager.
- "Child" under FMLA includes biological, adopted, foster, stepchild, legal ward, or in loco parentis child. For a child 18 or older, the child must be incapable of self-care due to a disability.
- "Spouse" under FMLA includes a same-sex spouse in a legal marriage. Domestic partners are NOT included under federal FMLA, but ARE included under Colorado FAMLI — a case involving a domestic partner may be FAMLI-only, not FMLA. See Section 9.
- Colorado FAMLI uses a BROADER family definition that includes siblings, grandparents, grandchildren, and chosen family. Do not assume that a family relationship qualifying for FAMLI also qualifies for FMLA.

8.4 Required Notices and Deadlines

FMLA requires three written notices, all using DOL-provided forms. All three must be sent within strict deadlines:

- Eligibility Notice (Part A of WH-381) — within 5 BUSINESS days of the leave request. Tells the employee whether they are FMLA-eligible.
- Rights & Responsibilities Notice (Part B of WH-381) — sent together with the Eligibility Notice. Explains the employee's rights and obligations under FMLA.
- Designation Notice (WH-382) — within 5 BUSINESS days of the Leave Coordinator having sufficient information to determine whether the leave qualifies (typically when a complete medical certification is received). Tells the employee whether the leave is FMLA-designated and how much counts toward their entitlement.

Procedure after eligibility determination (Section 8):

- **Step 1:** Open the blank WH-381 PDF from . Complete Part A with the employee's name, Employee ID, requested leave start date, and the eligibility determination. If not eligible, specify the failed criterion (tenure, hours, or both). Complete Part B with the employee's rights and responsibilities.
- **Step 2:** Save the completed WH-381 as a PDF in [Employee_ID]/ with filename format WH-381_[Case ID]_[Date].pdf.
- **Step 3:** Send the completed WH-381 to the employee via email using Template 2. Attach the completed WH-381 PDF.
- **Step 4:** If the employee IS eligible: in the same email, attach a blank WH-380-E (employee's own condition) or WH-380-F (family member's condition) and instruct the

employee that the completed medical certification is due within 15 CALENDAR days. See Section 8.

- **Step 5:** Update leave_tracker.xlsx: populate Eligibility Notice Date, Cert Requested Date (if applicable), Cert Due Date (Cert Requested Date + 15 calendar days), and Case Status = Active — Pending Certification.
- **Step 6:** Add the certification due date as an event in the HR Leave Deadlines Google Calendar.
- **Step 7:** Send Template 11 to the employee's manager with the limited-disclosure format (dates and type only, no medical details). See Section 10.
- **Step 8:** Post to #leave-intake using the format: FMLA INTAKE: [Case ID], [Employee Name], [Eligibility Status], [Reason Category], [Start Date], [Priority].

Designation Notice procedure — after complete medical certification is received:

- **Step 1:** Verify the certification is complete and sufficient (Section 8). If incomplete or insufficient, do NOT issue the Designation Notice — follow Section 8 instead.
- **Step 2:** Calculate the rolling 12-month balance per Section 8 and determine how many hours/weeks of FMLA will be designated for this case.
- **Step 3:** Open the blank WH-382 PDF. Complete with the leave dates, the amount of FMLA time being designated, and any fitness-for-duty certification requirement (required for continuous leave for own serious health condition — see Section 8).
- **Step 4:** Save the completed WH-382 to [Employee_ID]/ with filename WH-382_[Case ID]_[Date].pdf.
- **Step 5:** Send the WH-382 to the employee via email using Template 4. Attach the completed WH-382 PDF.
- **Step 6:** Update leave_tracker.xlsx: populate Designation Notice Date and Case Status = Active — Approved. Update Hours/Days Used and Rolling Balance fields.
- **Step 7:** Post to #leave-intake: FMLA DESIGNATED: [Case ID], [Employee Name], [Start Date], [Expected End Date], [Hours Designated].
- **Step 8:** Post to #payroll-coordination per Section 10.

8.5 Medical Certification

When a leave is for an employee's own or a family member's serious health condition, Ridgeline requires a medical certification on the appropriate DOL form. The employee has 15 calendar days from the date of the request to return a complete and sufficient certification.

Four possible paths based on what the employee returns:

- Path A — Complete and sufficient, received within 15 days: Proceed to Designation Notice (Section 8). This is the normal path.
- Path B — Incomplete, received within 15 days: The form has blank fields or missing signatures that must be filled in. Notify the employee in writing using Template 5, specify exactly which fields are missing, and give the employee 7 CALENDAR days to cure. Do NOT designate the leave until the cured certification is received. Do NOT treat an incomplete certification as insufficient — these are different categories under FMLA.
- Path C — Insufficient, received within 15 days: The form is fully filled in, but the information is vague, ambiguous, or does not clearly answer FMLA's requirements (e.g.,

the frequency of intermittent episodes is not specified, or the duration is unclear). INSUFFICIENT certifications require judgment and MUST be escalated to the Benefits Manager per Section 5.2. Do not attempt to clarify directly with the provider or employee without the Benefits Manager's direction.

- Path D — Not received by day 15: Send a reminder using Template 6 and allow exactly 3 business days for response if the delay is due to circumstances beyond the employee's control, such as the provider being closed. Document the reason for any extension in case notes. If the certification is not received within those 3 business days and no further legitimate justification is provided, escalate to Benefits Manager — the Benefits Manager will decide whether to deny the leave.

Incomplete vs. insufficient — critical distinction:

- INCOMPLETE = blank fields or missing signatures. The LC can identify this objectively and request cure independently.
- INSUFFICIENT = filled in but vague or non-responsive. Determining insufficiency requires judgment about whether the information answers FMLA's questions. This requires escalation to Benefits Manager per Section 5.2.
- If the LC is uncertain whether a certification is incomplete or insufficient, treat it as insufficient and escalate. It is always safe to escalate and never safe to guess.

GINA reminder:

Medical certifications occasionally contain more information than requested, including family medical history that is protected under GINA. If any such extra information appears: do not read or retain it, redact the extra information from the stored copy, and escalate to General Counsel per Section 5.4. Do not discuss the extra information with the employee or any other party.

8.6 Continuous, Intermittent, and Reduced Schedule Leave

FMLA leave can take three forms. The form determines how the leave is tracked and certified.

- Continuous leave: uninterrupted leave from the first day through the last day of the approved period. Example: employee takes 6 weeks off for surgery recovery. Simplest to administer.
- Intermittent leave: leave taken in separate blocks of time for the same qualifying reason. Example: employee takes FMLA one or two days at a time for migraine episodes, or half-day absences for physical therapy appointments. Requires tracking every absence individually.
- Reduced schedule leave: leave that reduces the employee's normal daily or weekly work schedule. Example: employee works 6 hours per day instead of 8 for 4 weeks during chemotherapy. Treated like intermittent leave for tracking purposes (2 hours of FMLA used per reduced day).

Tracking rules:

- Continuous: Log start date and expected end date in leave_tracker.xlsx. Total hours used = regular workweek hours × number of workweeks on leave.
- Intermittent: Log each absence individually with date, hours used, and running rolling-12-month balance. Recalculate the balance at every use.

- Reduced schedule: Log each reduced-hour day with the "missed" hours (e.g., employee working 6 of 8 hours = 2 hours of FMLA used that day).

Intermittent leave requires medical certification that specifies the expected frequency and duration. Example: "2 to 3 episodes per month, lasting 1 to 2 days each." The certification frequency becomes the baseline for pattern checks.

Pattern check:

At the 30-day review required by Section 7, compare actual usage to certified frequency. If actual usage exceeds certified frequency by more than 50% over any 30-day period, flag the case as a pattern concern and escalate to Benefits Manager per Section 5.2 and Section 12. Do not communicate the pattern concern to the employee or manager without Benefits Manager direction.

8.7 Tracking Leave Usage in leave_tracker.xlsx

Every FMLA case must be tracked in leave_tracker.xlsx from intake through closure. The following fields must be populated and kept current:

- Case ID (generated at intake; format LC-YYYY-NNNN).
- Employee ID.
- Leave Type(s) — list all applicable (e.g., "FMLA + FAMI").
- Start Date (requested or actual leave start).
- Expected End Date.
- Actual End Date (blank until closure).
- Leave Form — Continuous / Intermittent / Reduced Schedule.
- Hours Used To Date.
- Rolling 12-Month Balance (as of the most recent use).
- Cert Status — Not Required / Requested / Pending / Received-Complete / Received-Incomplete / Insufficient / Escalated.
- Cert Due Date.
- Manager Notified (Y/N) and Date.
- Priority (P1/P2/P3/P4).
- Case Status — Intake / Active-Pending Cert / Active-Approved / Pending Extension / Denied / Closed.
- Notes (running log of every action, dated).

Update rules:

- At intake: populate all fields except Actual End Date and (if cert not yet requested) the cert fields.
- At each intermittent absence: add a row to the Absence Log sub-tab with date and hours, and update Hours Used To Date and Rolling Balance fields in the main tab.
- At cert receipt: update Cert Status and append a Notes entry with the date received and the outcome (complete/incomplete/insufficient/escalated).
- At Designation Notice: update Case Status to Active-Approved and note the designation in Notes.

- At return or closure: populate Actual End Date, set Case Status to Closed, and complete the case closure checklist in Section 12.

8.8 Return to Work and Fitness-for-Duty Certification

Return-to-work procedures differ based on the type of leave and the type of condition.

Fitness-for-duty certification required when:

- The leave was continuous AND for the employee's own serious health condition AND Ridgeline specified the fitness-for-duty requirement in the Designation Notice (WH-382).

Fitness-for-duty certification NOT required when:

- The leave was for a family member's serious health condition.
- The leave was for bonding.
- The leave was intermittent for the employee's own condition (in most cases). Exception: if intermittent leave exceeds 30 consecutive calendar days, the Benefits Manager may elect to require fitness-for-duty — escalate if unsure.

Return-to-work procedure:

- Step 1. Five business days before the scheduled return, verify that fitness-for-duty certification (if required) has been received. If not received, send a reminder to the employee using Template 8.
- Step 2. Two business days before the scheduled return, notify the manager of the expected return date and any certified work restrictions using Template 12. Do NOT disclose medical reasons for the restrictions.
- Step 3. If the fitness-for-duty certification clears the employee with no restrictions: proceed to Step 5.
- Step 4. If the fitness-for-duty certification includes restrictions: ESCALATE IMMEDIATELY to the HR Director per Section 5.3. Restrictions trigger an ADA-like analysis that is outside the Leave Coordinator's authority. Do not communicate the restrictions to the manager until the HR Director has directed the response.
- Step 5. On the day of return, the manager confirms in #leave-intake that the employee has returned. The Leave Coordinator posts a return confirmation to #payroll-coordination per Section 10.
- Step 6. Complete the case closure checklist in Section 12 and set Case Status to Closed.

Failure to return:

If the employee does not return on the scheduled date and has not contacted the Leave Coordinator or their manager with a legitimate reason for extension: do NOT assume the employee has abandoned their job. Attempt to contact the employee once via the contact preference on file. If no response within 2 business days, ESCALATE to the HR Director per Section 5.3. Failure-to-return cases have specific legal handling requirements that are outside the Leave Coordinator's authority.

8.9 Denials and Escalations

Most FMLA denials require approval above the Leave Coordinator. Only two narrow categories may be issued independently.

Denials the Leave Coordinator may issue independently (per Section 5.1):

- Ineligibility due to insufficient tenure (less than 12 months) — confirmed from `employee_roster.xlsx`.
- Ineligibility due to insufficient hours (less than 1,250 in the preceding 12 months) — confirmed from `hours_worked_log.xlsx` for non-exempt employees only. For exempt employees without a timesheet, escalate even when the imputed hours appear below 1,250, because the imputation itself involves judgment.

Denials requiring Benefits Manager approval (per Section 5.2):

- Insufficient certification after cure window expires.
- Exhausted FMLA entitlement in the rolling 12-month period.
- Reason claimed does not appear to qualify (e.g., not a serious health condition).
- Second or third opinion situations.
- Any denial where the employee has expressed disagreement or requested reconsideration.
- Any denial of a request to extend beyond the 12-week cap (or 26-week cap for military caregiver leave).

Denials requiring General Counsel consultation (per Section 5.4):

- Any denial where the employee has mentioned an attorney, EEOC, CDLE, DOL, or lawsuit.
- Any denial where the employee has alleged retaliation or discrimination.
- Any denial connected to active litigation.

Denial procedure:

- Step 1. Confirm which authority level applies from the lists above.
- Step 2. For LC-level denials (tenure/hours ineligibility only): prepare the WH-381 with Part A marked "Not Eligible" and the specific failed criterion noted. Send via Template 3. CC Benefits Manager on the email.
- Step 3. For escalated denials: prepare a case summary in `leave_tracker.xlsx` Notes (employee name, Employee ID, requested leave, reason, basis for denial, any relevant prior communications). Forward the email thread and case summary to the Benefits Manager via #benefits-team. WAIT for written approval before communicating with the employee.
- Step 4. Log denial in `leave_tracker.xlsx` with Case Status = Denied and a Notes entry explaining the basis.
- Step 5. If the employee responds challenging the denial: DO NOT reply. Forward the response to the Benefits Manager and wait for direction. This applies even for LC-level denials — challenges to ineligibility denials sometimes reveal data errors in `hours_worked_log.xlsx` that the LC cannot independently resolve.

9. Colorado FAML I Procedure

Colorado Family and Medical Leave Insurance (FAML I) is the state paid-family-leave program administered by the Colorado Department of Labor and Employment (CDLE). FAML I and FMLA are separate laws with separate eligibility rules, but they frequently apply to the same leave event. When both apply, concurrent designation is required.

9.1 Overview

- FAML I provides up to 12 weeks of paid leave per benefit year for qualifying reasons. An additional 4 weeks (16 weeks total) are available for pregnancy or childbirth complications.
- Wage replacement under FAML I is paid by CDLE, NOT by Ridgeline. The Leave Coordinator should never discuss wage replacement amounts with employees.
- FAML I claims are filed by the employee directly with CDLE. The Leave Coordinator does NOT file claims on the employee's behalf and should direct any filing questions to CDLE at claims@famli.colorado.gov.
- Ridgeline's role is coordination: responding to CDLE claim notices, providing required notices to employees, maintaining health insurance during leave, and designating concurrent FMLA when applicable.
- FAML I includes job-protection rights similar to FMLA for employees who have worked for their current employer for at least 180 days.
- Ridgeline maintains a dedicated FAML I employer inbox at famli-employer@ridgelinegear.com. CDLE sends Employer Response notices to this inbox via email from claims@famli.colorado.gov. The Leave Coordinator monitors this inbox every business day.

9.2 FAML I Eligibility

FAML I eligibility is substantially different from FMLA eligibility:

- The employee must have earned at least \$2,500 in wages in the base period (the first 4 of the last 5 completed calendar quarters before the claim).
- There is NO tenure requirement with Ridgeline specifically. FAML I counts wages from all Colorado employers in the base period.
- There is NO minimum-hours requirement.
- There is NO worksite-size requirement.

Implication: Many employees who are NOT eligible for FMLA (because of short tenure or insufficient hours) ARE eligible for FAML I. An employee who is not FMLA-eligible (because of short tenure or insufficient hours) may still be FAML I-eligible if they have earned \$2,500 in the base period.

9.3 Concurrent Designation with FMLA

Core rule: When a leave event qualifies under BOTH FMLA and FAML I, the Leave Coordinator MUST designate the leave as both, concurrently. The two entitlements run together on the same days. The employee does NOT get 12 weeks of FMLA plus 12 weeks of FAML I separately.

Exceptions to concurrent designation:

- If the employee is eligible for only one of the two laws, only that one applies.
- If the qualifying reason is recognized under one law but not the other (e.g., FAMLI "safe leave" for domestic violence, which has no FMLA equivalent), only the applicable law applies.
- If the employee claims a family relationship recognized under FAMLI but not FMLA (e.g., sibling or grandparent), only FAMLI applies. See Section 8.

When in doubt about whether the reasons align, escalate to the Benefits Manager per Section 5.2.

9.4 FAMLI Qualifying Reasons

FAMLI qualifying reasons overlap with FMLA but are broader in some areas:

- Employee's own serious health condition (same standard as FMLA).
- Family member's serious health condition — with a BROADER family definition than FMLA. FAMLI family includes spouse, domestic partner, child (any age), parent, sibling, grandparent, grandchild, and any individual in a family-like relationship with the employee.
- Bonding with a new child (birth, adoption, foster placement) — same as FMLA, within 12 months.
- Qualifying exigency for a family member's covered military service — same as FMLA.
- Safe leave — for domestic violence, sexual assault, or stalking affecting the employee or a family member. This category is FAMLI-only; FMLA does not provide safe leave.

9.5 Procedure When an Employee Files a FAMLI Claim

- **Step 1:** Employees file FAMLI claims directly with CDLE. The Leave Coordinator does NOT file on the employee's behalf and should not advise on how to file beyond directing the employee to contact CDLE at claims@famli.colorado.gov.
- **Step 2:** When CDLE processes a claim, it sends an Employer Response notice via email from claims@famli.colorado.gov to Ridgeline's dedicated FAMLI employer inbox at famli-employer@ridgelinegear.com. The Leave Coordinator monitors this inbox every business day at the start of the day.
- **Step 3:** When an Employer Response notice arrives, the Leave Coordinator has 5 BUSINESS days to respond per Section 7.
- **Step 4:** Open [famli_coordination_log.xlsx](#). Create a new row with Employee ID, FAMLI Claim ID, Claim Start Date, Claimed Reason Category, and (if applicable) Concurrent FMLA Case ID.
- **Step 5:** Verify the claim against any active FMLA case for the same employee. If the FAMLI claim reasons match an active FMLA case, link the two cases. If the reasons diverge (e.g., the FAMLI claim is for a sibling but no FMLA case is open), escalate to the Benefits Manager per Section 5.2 — the divergence may indicate a FAMLI-only case or a data error.
- **Step 6:** If no FMLA case is open but the employee IS FMLA-eligible AND the FAMLI reason would also qualify under FMLA, OPEN a concurrent FMLA case immediately and begin the FMLA designation procedure in Section 8. Concurrent designation is required

— failing to open an FMLA case here means the employee would accumulate FAMILI usage without FMLA usage, giving them more total leave than the law intends.

- **Step 7:** Submit the Employer Response by replying to the original CDLE email at claims@famli.colorado.gov. Include in the reply: employee name and Ridgeline Employee ID, FAMILI Claim ID from the original notice, confirmation of employment, confirmation of leave dates, and confirmation of whether FMLA is running concurrently (with concurrent Case ID if applicable).
- **Step 8:** Send Template 18 to the employee confirming the concurrent designation and directing all wage-replacement questions to CDLE.
- **Step 9:** Post to #leave-intake: FAMILI INTAKE: [Case ID], [Employee Name], [Concurrent FMLA: Y/N], [Start Date].
- **Step 10:** Post to #payroll-coordination to notify the Payroll Lead of the FAMILI start date per Section 10.

9.6 FAMILI-Only Cases (Not FMLA-Eligible)

An employee may be eligible for FAMILI but not FMLA. In this case the Leave Coordinator still administers and tracks the leave, but only under FAMILI rules:

- Open a Case ID in `leave_tracker.xlsx` with Leave Type = "FAMILI" (not "FMLA + FAMILI").
- Track in `famli_coordination_log.xlsx` normally.
- Do NOT send FMLA notices (WH-381 or WH-382) for a FAMILI-only case.
- Job restoration questions for FAMILI-only cases must be escalated to the Benefits Manager — FAMILI has its own 180-day employment threshold for job restoration that differs from FMLA's rules.

9.7 Wage Replacement and Health Insurance

- Ridgeline does NOT pay wage replacement during FAMILI. The CDLE pays the employee directly from the FAMILI fund.
- Leave Coordinator must NEVER discuss wage replacement amounts or calculations with the employee. All such questions are directed to CDLE directly at claims@famli.colorado.gov or, if the employee insists on speaking with someone at Ridgeline, to the Benefits Manager.
- Health insurance continuation: Ridgeline must maintain the employee's health insurance during FAMILI leave on the same terms as if the employee were actively working. Premium collection during leave is handled by the Payroll Lead — notify Payroll via #payroll-coordination at leave start.
- PTO supplementation: Colorado law allows employees to supplement FAMILI wage replacement with accrued PTO up to 100% of their regular wages. The Leave Coordinator does NOT calculate or administer this — route all PTO supplementation questions to the Payroll Lead per Section 10.

9. ADA Accommodation Intake Procedure

The Leave Coordinator handles ADA accommodation requests on an INTAKE-ONLY basis. All accommodation decisions, including whether to grant, deny, or propose alternatives, are made by the HR Director through the interactive process. The Leave Coordinator's role is strictly to recognize an ADA request, acknowledge it, route it, and track it.

9.1 Recognizing an ADA Request

ADA accommodation requests rarely arrive with the words "ADA accommodation" on them. The Leave Coordinator must recognize an accommodation request in any of the following forms:

- "I need a reasonable accommodation for [X]."
- "Because of my disability, I need [X]."
- "My doctor says I need [X] at work."
- "I'm having trouble doing [essential function] because of my [medical condition]."
- "Can I work from home because of [medical condition]?"
- "I need a different chair / schedule / assignment because of [condition]."
- An employee returning from FMLA/FAMLI who asks for work restrictions or a modified schedule.
- Any indirect mention of a physical or mental limitation affecting job performance.

Rule: When in doubt, treat it as an ADA request and route it. It is always better to over-intake than to miss an accommodation request. Missing an ADA request exposes Ridgeline to significant legal risk.

9.2 Intake Procedure

- **Step 1:** Same-business-day acknowledgment. Reply to the employee using Template 19. The acknowledgment confirms receipt, tells the employee the HR Director will be in contact to discuss the request, and provides no information about whether the accommodation will be granted.
- **Step 2:** Same-business-day routing. Forward the original email thread to Daniel Whitfield (daniel.whitfield@ridgelinegear.com) with subject line "ADA ACCOMMODATION REQUEST — [Employee Name]".
- **Step 3:** Post to #hr-escalations using format: ADA REQUEST: [Employee Name], [Case ID], [Date Received] — routed to HR Director.
- **Step 4:** Open leave_tracker.xlsx. Create a case with Leave Type = "ADA Accommodation" (even though it is not technically leave), Case Status = "Intake — Routed to HR Director", and Priority per Section 6.
- **Step 5:** Store any medical information included in the request in [Employee_ID]/ with restricted access. Do NOT store medical information in the general case file.
- **Step 6:** Update leave_tracker.xlsx case notes only as directed by the HR Director. The LC does not independently progress an ADA case after intake.

9.3 Actions the Leave Coordinator Must NEVER Take on an ADA Case

- **NEVER** tell the employee their accommodation is granted or denied.
- **NEVER** tell the employee what accommodations are available or might be offered.
- **NEVER** ask the employee what their disability is.
- **NEVER** request medical documentation from the employee or a provider. Medical documentation in the interactive process is requested by the HR Director if needed.
- **NEVER** communicate with the manager about the accommodation request unless specifically directed by the HR Director.

- **NEVER** place ADA-related documentation in the employee's general personnel file. All ADA documentation lives in .
- **NEVER** speculate with the employee about timelines, outcomes, or what the HR Director "probably" will decide.

9.4 Interaction Between ADA and FMLA/FAMLI

An employee may simultaneously have an FMLA/FAMLI leave request and an ADA accommodation request. Common scenarios:

- An employee recovering from surgery requests FMLA leave for the recovery period AND asks for modified duty upon return.
- An employee on intermittent FMLA for a chronic condition asks for a workspace modification related to the same condition.
- An employee requests FMLA leave, and in the same email mentions long-term accommodations they will need when they return.

Handling these cases:

- The LC handles the FMLA/FAMLI side under Section 13.
- The LC routes the ADA side to the HR Director under Section 9.
- Track both in the same Case ID in leave_tracker.xlsx, with both Leave Types listed (e.g., "FMLA + FAMLI + ADA Accommodation").
- Keep FMLA medical certification (WH-380-E/F) and any ADA medical documentation in SEPARATE files within [Employee_ID]/. The FMLA cert and the ADA documentation should never be combined into one document, even if they come from the same provider.
- If the employee asks about both in one email, the consolidated acknowledgment per Section 6 must cover both topics without merging them. The FMLA/FAMLI acknowledgment uses Section 13 templates; the ADA acknowledgment uses Template 19.

10. Working With Managers

Managers are frequent sources of error in leave administration because they often want information they are not entitled to, and they often do not know what they can and cannot ask of an employee on protected leave. This section defines the limits and procedures for manager interaction.

10.1 What a Manager May and May Not Know

A manager needs enough information to administer their team's work during an employee's leave, but NOT medical details. The boundary is strict and non-negotiable.

A manager MAY be told:

- That the employee is on approved leave (without specifying the type or reason).
- The expected start date of the leave.
- The expected return date.
- Whether the leave is continuous, intermittent, or reduced schedule.

- For intermittent leave, the general frequency (e.g., "up to 3 days per month" or "up to 2 hours per week") — but NOT the verbatim certified frequency.
- Any work restrictions upon return, as stated on the fitness-for-duty certification — but NOT the medical reason for the restrictions.

A manager MAY NOT be told:

- The specific medical condition, diagnosis, or treatment.
- Any family member's medical information.
- Any information the employee has not explicitly consented to share.
- Anything from the WH-380-E, WH-380-F, or fitness-for-duty certification that is not a work restriction.
- The name or identity of any family member involved in a family-care leave.
- Whether the leave is FMLA, FAMILI, ADA, or workers' compensation — unless there is a specific operational reason the manager needs to know (in which case, state only the leave type, not the reason).

10.2 Standard Manager Notification

When the Leave Coordinator issues the FMLA Designation Notice (or equivalent FAMILI designation), the LC simultaneously sends a standardized Manager Leave Notification to the employee's manager.

The Template 11 includes ONLY:

- Employee name.
- Leave general category — "approved leave" or, if operationally necessary, "FMLA leave" (without the reason).
- Start date.
- Expected end date.
- Continuous, intermittent, or reduced schedule status. For intermittent, provide a general frequency range only.
- Any work restrictions upon return (if known).
- Instruction to direct all operational questions about the leave to the Leave Coordinator, not to the employee.

The Manager Leave Notification must NEVER include the reason category, medical details, or any information from the medical certification beyond work restrictions.

10.3 Manager-Initiated Questions About an Employee's Leave

- **Step 1:** Verify the requesting manager is the employee's manager of record per employee_roster.xlsx. Managers may inquire only about their own direct reports.
- **Step 2:** Identify what the manager is asking. Determine which information they are entitled to under Section 10.
- **Step 3:** If the request is within the manager's entitlement: respond using Template 13 with ONLY the information they may have.

- **Step 4:** If the request exceeds the manager's entitlement: decline politely using Template 14, which explains that medical details are confidential and directs the manager to contact the Leave Coordinator for operational needs.
- **Step 5:** If the manager persists, becomes demanding, or expresses dissatisfaction with the limits: escalate to the HR Director per Section 5.3. Do not attempt to mediate or persuade the manager directly.
- **Step 6:** Document every manager request in the case notes, including the request, the response, and any escalation.

10.4 Manager Reports of Suspected Leave Abuse

Managers sometimes report concerns about their employee's leave usage. Examples of such reports:

- "Employee has called in sick every Friday for the past month."
- "Employee's intermittent FMLA absences always fall on the day after a major holiday."
- "Employee is using intermittent leave more often than the doctor's note said."
- "Employee was seen at a sporting event on a day they were out on FMLA."

Procedure:

- **Step 1:** Thank the manager for the information and tell them the LC will review the case. Do NOT agree or disagree with the manager's assessment.
- **Step 2:** Document the manager's report verbatim in leave_tracker.xlsx case notes with date and manager name.
- **Step 3:** Open the case and review the certified frequency (for intermittent leave) against the Absence Log.
- **Step 4:** If actual usage exceeds certified frequency by more than 50% over any 30-day period, or if the pattern suggests potential fraud, escalate to the Benefits Manager per Section 5.2 and Section 12.
- **Step 5:** If the usage is within the certified frequency, respond to the manager using Template 15, which states generally that the absences are within approved limits. Do NOT disclose the certified frequency verbatim; the frequency is medical-related information.
- **Step 6:** If the manager indicates they intend to discipline the employee for the protected absences (e.g., "I'm going to write her up for excessive absenteeism"): IMMEDIATELY escalate to the HR Director per Section 5.3. Disciplining an employee for FMLA-protected absences is a textbook interference claim. Do not attempt to educate the manager yourself.

10.5 Manager Coordination During Active Leave

During continuous leave:

- Work-related communication between manager and employee should go through the Leave Coordinator except in cases of genuine operational emergency.
- The manager may NOT contact the employee to discuss work assignments, return dates, performance issues, or operational matters without informing the Leave Coordinator.

- If an operational question arises that only the employee can answer (e.g., location of a client file), the Leave Coordinator may facilitate a one-time communication but should never require the employee to respond.

During intermittent leave:

- The employee calls in per Ridgeline's normal call-in procedures and designates the absence as FMLA-covered.
- The manager logs the absence in the attendance system and notifies the Leave Coordinator via email or #leave-intake.
- The Leave Coordinator updates leave_tracker.xlsx with the absence hours and recalculates the rolling balance.
- The manager may ask the employee why they are using leave on a specific day ONLY to confirm the absence is for the certified reason — and the employee need only confirm yes or no. The manager may not demand medical details.

10.6 Return-to-Work Coordination

- Five business days before the scheduled return date, the LC verifies that fitness-for-duty certification has been received (if required for the case).
- Two business days before the scheduled return date, the LC notifies the manager of the expected return and any work restrictions using Template 12.
- On the day of return, the manager confirms in #leave-intake that the employee has returned for their scheduled shift.
- The LC closes the case per the case closure checklist in Section 12.
- If the employee does not return on the scheduled date, follow the failure-to-return procedure in Section 8.

10. Benefits & Payroll Handoff

Benefits continuation, premium billing, wage replacement calculations, tax withholding, 401(k) administration, and PTO supplementation are outside the Leave Coordinator's authority. The Leave Coordinator's role in these areas is strictly notification and handoff. Answering any of these questions yourself — even if you believe you know the answer — is a violation of Section 5.5.

10.1 Events That Trigger Payroll Notification

The Leave Coordinator must notify the Payroll Lead (Teresa Vang) via #payroll-coordination for every one of the following events:

- Leave start — the first day of any approved continuous leave, or the first intermittent-leave absence in a newly opened case.
- Transition to unpaid status — e.g., when paid PTO supplementation ends and the employee transitions to unpaid FMLA.
- Scheduled return from continuous leave.
- Actual return from leave (confirmation from the manager).
- Each intermittent-leave absence that reduces the employee's scheduled paid hours.
- Case closure.

- Any retroactive designation that affects pay periods already processed (also escalate to Benefits Manager per Section 5.2).

10.2 Payroll Notification Format

Post to #payroll-coordination using the standard format:

LEAVE PAYROLL NOTIFICATION: [Case ID], [Employee Name], [Event Type], [Effective Date], [Continuous/Intermittent], [Notes]

Example:

LEAVE PAYROLL NOTIFICATION: [Case ID], [Employee Name], [Event Type], [Effective Date], [Continuous/Intermittent], [Notes].

Do not include medical details, diagnoses, or the reason category in the payroll notification. "FMLA + FAML I concurrent" is the maximum level of detail; never "FMLA for surgery" or "FAML I for birth of child."

10.3 Employee Payroll Questions — Handoff Required

When an employee asks the Leave Coordinator any of the following types of questions, the LC does NOT answer. The LC responds using Template 16 and forwards the question to the Payroll Lead:

- "Will I still get paid during my leave?"
- "Can I use PTO to supplement my FAML I payments?"
- "What happens to my health insurance premiums while I'm on leave?"
- "Will my 401(k) contributions continue?"
- "Is my FAML I wage replacement taxed?"
- "How much will my FAML I wage replacement be?"
- "Will my PTO still accrue while I'm on leave?"
- "How does this affect my paycheck?"
- Any question involving a dollar amount, percentage, rate, or tax calculation.
- Any question about pay stub contents.
- Any question about the timing of pay during leave.

The Template 16 explicitly tells the employee that the Leave Coordinator has forwarded the question to Teresa Vang, who will respond directly. The LC does NOT provide any partial answer, estimate, or "I think it works like" statement before the handoff.

10.4 Benefits Continuation — Handoff Rules

During any unpaid leave (unpaid FMLA, FAML I regardless of wage replacement, personal unpaid leave), the following actions are handled by other roles, NOT the Leave Coordinator:

- Health insurance premium billing and collection during unpaid leave — Payroll Lead (Teresa Vang).
- Health insurance continuation eligibility and rules — Benefits Manager (Renata Okafor).
- 401(k) contribution suspension and resumption — Payroll Lead.

- HSA and FSA contribution rules during leave — Benefits Manager.
- PTO and sick leave accrual during leave — Payroll Lead.
- COBRA notification if a leave converts to separation — Benefits Manager.

The LC's only role in benefits continuation is to notify the Payroll Lead promptly of the start and end of any unpaid period, so that Payroll can manage premium billing and any paycheck adjustments. The LC does not discuss these topics with the employee under any circumstances.

10.5 Manager Questions About Payroll Impact

Managers sometimes ask how an employee's leave affects payroll. Examples:

- "Does this absence count against their PTO?"
- "Are they still getting paid this week?"
- "How do I code this on the timesheet?"

Respond using Template 17, which tells the manager the LC has forwarded their question to Teresa Vang. Do not answer the question directly, even if the answer seems obvious. Payroll coding and paycheck impacts are Teresa's responsibility, not the LC's.

11. Colorado HFWA & Other Paid Leave

This section covers the paid and unpaid leave types not addressed in Sections 13–15: Colorado HFWA sick leave, company PTO, bereavement leave, jury duty leave, USERRA military leave, and personal unpaid leave. Most of these are simpler than FMLA/FAMLI, but each has specific intake rules and several contain traps for a junior employee who treats them as routine.

11.1 Colorado HFWA Sick Leave

The Colorado Healthy Families and Workplaces Act (HFWA) requires Ridgeline to provide paid sick leave to all employees.

- All employees accrue from their first day of employment — no waiting period.
- Accrual rate: 1 hour of HFWA sick leave per 30 hours worked.
- Annual cap: 48 hours accrued per calendar year.
- Balance cap: 48 hours maximum; carryover is also capped at 48 hours.
- Paid at the employee's regular rate of pay.
- No advance notice required for unforeseeable use. For foreseeable use, reasonable notice is expected but cannot be required as a condition of use.
- Documentation may be required only when the absence exceeds 4 consecutive workdays.

Qualifying reasons for HFWA sick leave:

- Employee's own illness, injury, or health condition, including preventive care.
- A family member's illness, injury, or health condition, including preventive care (HFWA uses the broader Colorado family definition, not the narrower FMLA definition).

- Public health emergency declared by a federal, state, or local authority that causes closure of the employee's workplace or the employee's child's school or care provider.
- Safe leave: needs related to domestic violence, sexual assault, or stalking affecting the employee or a family member.

Procedure for HFWA sick leave requests and inquiries:

- **Step 1:** Verify the sender via triage per Section 6.
- **Step 2:** Determine whether the request is (a) a balance inquiry, (b) a notification of HFWA use, or (c) a request to apply HFWA retroactively to an absence already taken.
- **Step 3:** For balance inquiries: open `hfw_balance_tracker.xlsx`, locate the employee, and respond with current YTD Accrued, YTD Used, and Current Balance using Template 20. Priority P4.
- **Step 4:** For use notifications: verify the reason falls within a qualifying category. If the reason is vague or not clearly qualifying, ask the employee only for a reason category (per Section 6, do not ask for medical details).
- **Step 5:** Reclassification check: if the reason described is for a condition that could qualify as an FMLA "serious health condition" (e.g., hospitalization, continuing treatment, condition lasting more than 3 consecutive days with ongoing treatment), the Leave Coordinator must open a concurrent FMLA/FAMLI intake per Section 6 — even if the employee only asked about HFWA. HFWA is not a substitute for FMLA and cannot be used to avoid FMLA designation.
- **Step 6:** If the absence is 4 or more consecutive workdays, send Template 21 asking for documentation. Do not require documentation for shorter absences.
- **Step 7:** Log the HFWA use in `hfw_balance_tracker.xlsx`: increment YTD Used by the hours used and recalculate Current Balance. Update `leave_tracker.xlsx` with a Case ID only if the absence is 2 or more consecutive days, or if concurrent FMLA/FAMLI applies.
- **Step 8:** Post to #leave-intake only if the absence is 2 or more consecutive days or involves concurrent FMLA/FAMLI. Do not post individual single-day HFWA absences to Slack.
- **Step 9:** Notify the manager via Template 11 if the absence affects scheduled work. Include dates only — never the reason category.

HFWA classification disputes:

If the employee and Leave Coordinator disagree about whether HFWA applies to an absence (e.g., employee claims HFWA for a reason that does not appear to qualify), this is an HFWA classification dispute and must be escalated to the Benefits Manager per Section 5.2. Do not deny HFWA use independently.

11.2 Company PTO

The Leave Coordinator handles company PTO only when it intersects with another leave case. PTO balance inquiries, PTO request approvals, and PTO-only absence questions are NOT the Leave Coordinator's responsibility and must be routed elsewhere.

What the Leave Coordinator DOES handle:

- Requests to substitute PTO for unpaid FMLA or FAMLI (e.g., employee wants to use accrued PTO during the unpaid portion of their leave).

- Coordination with Payroll Lead when PTO substitution starts or ends during an active leave case.
- Noting in leave_tracker.xlsx that PTO substitution is active for a given case.

What the Leave Coordinator does NOT handle:

- PTO balance inquiries — direct to Payroll Lead via Template 16.
- PTO request approvals (non-leave) — direct to the employee's manager.
- Calculation of PTO accrual rates or balance caps.
- PTO payout on separation.

Procedure for PTO substitution during an active leave case:

- **Step 1:** Confirm from the employee that they wish to substitute accrued PTO during the unpaid portion of their leave.
- **Step 2:** Note the substitution request in leave_tracker.xlsx case notes.
- **Step 3:** Post to #payroll-coordination: PTO SUBSTITUTION: [Case ID], [Employee Name], [Start Date], [End Date or "until balance exhausted"]. Teresa Vang handles the actual balance calculation and pay coding.
- **Step 4:** Respond to the employee using Template 22, confirming the substitution has been communicated to Payroll and directing all balance and pay questions to Payroll Lead.
- **Step 5:** Do NOT tell the employee how much PTO they have, how many weeks the substitution will last, or how PTO interacts with FMLI wage replacement. These are Payroll questions.

11.3 Bereavement Leave

Ridgeline offers paid bereavement leave for the death of a family member:

- 3 days (24 hours for a full-time employee) for immediate family: spouse, domestic partner, parent, child, or sibling.
- 1 day (8 hours for a full-time employee) for extended family: grandparent, grandchild, in-laws (parent, child, or sibling of spouse), aunt, uncle, niece, or nephew.
- Paid at the employee's regular rate.
- Documentation (obituary, death certificate, or funeral program) required within 30 calendar days.
- Can be taken at the time of the loss or at a later memorial/service date within 30 days of the death.

Priority: Immediate family bereavement is P1. Extended family bereavement is P2.

Procedure:

- **Step 1:** Same-business-day acknowledgment using Template 23. Express condolences briefly and professionally.
- **Step 2:** Verify the stated family relationship against the immediate/extended family lists above. There are three possible outcomes:
 - **Step 2a:** Relationship is on the immediate or extended family list: proceed to Step 3.

- **Step 2b:** Relationship is ambiguous (e.g., step-parent, long-term unmarried partner, chosen family, in-law not specified above): escalate to the Benefits Manager before approving — do not make the relationship determination independently. Wait for the Benefits Manager's written decision before proceeding.
- **Step 2c:** Relationship is clearly outside both lists (e.g., friend, neighbor, cousin, professional colleague, distant relative not on either list): bereavement leave does not apply under Ridgeline policy. Send Template 30 (Bereavement Not Covered) to the employee, which explains the policy boundary and offers PTO or personal unpaid leave (Section 11) as alternatives. Do NOT open a bereavement case in leave_tracker.xlsx and do NOT escalate to the Benefits Manager — this is a clear policy boundary the LC may communicate directly. If the employee subsequently requests PTO or personal unpaid leave, open a new case under the appropriate type.
- **Step 3:** Open leave_tracker.xlsx: Case ID, Leave Type = Bereavement, Start Date, Expected End Date (Start Date + 3 days for immediate or + 1 day for extended).
- **Step 4:** Notify the manager using Template 11 (dates only — do NOT include the name of the deceased unless the employee has specifically asked that you share it).
- **Step 5:** Post to #payroll-coordination with the standard leave notification format.
- **Step 6:** Add a calendar event for the documentation deadline: 30 calendar days from the date of loss, in the HR Leave Deadlines Google Calendar.
- **Step 7:** Upon receipt of documentation: file in the employee's non-medical HR file with filename bereavement_[Case ID]_[Date].pdf. Note: bereavement documentation is NOT medical information and should NOT be filed in .
- **Step 8:** If documentation is not received within 30 calendar days: reclassify the leave as PTO. Update leave_tracker.xlsx to reflect the reclassification, notify Payroll Lead via #payroll-coordination to adjust coding, and send Template 24 to the employee.

Extended bereavement requests:

If the employee requests more than the policy allowance (e.g., 5 days for immediate family instead of 3), escalate to the Benefits Manager. Options typically include PTO supplementation or unpaid leave. Do not approve extensions independently.

11.4 Jury Duty Leave

Colorado law and Ridgeline policy both protect jury duty leave:

- All employees are eligible from day 1.
- Paid at regular wages, minus any jury compensation received from the court. Payroll handles this calculation; the Leave Coordinator does not.
- No maximum duration — the employee is covered for the full length of jury service.
- Summons documentation must be provided to HR within 2 business days of the employee's receipt of the summons (Section 7 Deadline Matrix).
- Employees must return to work during any day or portion of a day when they are not required at court, unless the employee is excused in writing by the court or the supervisor.

Procedure:

- **Step 1:** Receive the jury summons from the employee (typically forwarded via email as a PDF scan or photo).

- **Step 2:** Verify the summons appears legitimate: check that it names a specific court, includes a case or juror number, and states a specific reporting date.
- **Step 3:** Open leave_tracker.xlsx: Case ID, Leave Type = Jury Duty, Start Date (from summons), Expected End Date (initially set to Start Date + 1 day; update when actual duration is known).
- **Step 4:** Notify the manager using Template 11.
- **Step 5:** Post to #payroll-coordination with the standard leave notification format so Teresa Vang can code jury duty correctly on the timesheet.
- **Step 6:** File the summons in the employee's non-medical HR file with filename jury_summons_[Case ID]_[Date].pdf. Do NOT file in — a jury summons is not medical information.
- **Step 7:** When jury duty ends, update leave_tracker.xlsx with Actual End Date. Notify the manager and Payroll Lead of the return date.
- **Step 8:** If the jury compensation check is sent to Ridgeline (some courts do this): forward the check to Teresa Vang for processing per Ridgeline policy. The Leave Coordinator does not endorse, cash, or retain jury checks.

Extended jury duty (more than 5 consecutive business days) should be flagged to the Benefits Manager. Extended jury service is rare and may involve special scheduling or pay questions.

11.5 USERRA and Military Leave — Intake Only

USERRA (Uniformed Services Employment and Reemployment Rights Act) is a federal law protecting the employment of military servicemembers. USERRA cases are COMPLEX and HIGH-STAKES. The Leave Coordinator's role is intake only — all substantive handling is done by the Benefits Manager.

Procedure:

- **Step 1:** Same-business-day acknowledgment using Template 25. The acknowledgment confirms receipt and tells the employee the Benefits Manager will be in contact.
- **Step 2:** Open leave_tracker.xlsx: Case ID, Leave Type = USERRA, Case Status = Intake — Routed to Benefits Manager.
- **Step 3:** Request military orders from the employee if not already provided. Military orders are non-medical documents but should still be filed in the employee's non-medical HR file.
- **Step 4:** Forward the email thread and any orders to the Benefits Manager (Renata Okafor) immediately with subject line "USERRA REQUEST — [Employee Name]".
- **Step 5:** Post to #hr-escalations: USERRA REQUEST: [Employee Name], [Case ID], [Start Date], [Duration if known] — routed to Benefits Manager.
- **Step 6:** Do NOT advise the employee on USERRA rights, pay continuation, benefits continuation, reemployment rights, or escalation of rank upon return. All such discussions are the Benefits Manager's responsibility.
- **Step 7:** Update leave_tracker.xlsx case notes only as directed by the Benefits Manager.

Limited exception:

The Leave Coordinator may receive and log a short, routine military absence (such as a single weekend of National Guard drill, under 3 days) without escalating to the Benefits Manager, provided the employee has provided orders and there is no pay or benefits question. Any military leave exceeding 3 days, any activation for extended duty, any reservist call-up, and any case where the employee asks any question about pay, benefits, or reemployment MUST be escalated.

11.6 Personal Unpaid Leave

Personal unpaid leave is a discretionary benefit under Ridgeline Handbook §4.8. It is NOT an entitlement. The Leave Coordinator's role is intake and routing; approval requires both the employee's manager and the HR Director.

Policy parameters:

- Up to 30 calendar days maximum.
- Unpaid.
- Discretionary — may be denied for any legitimate business reason.
- Requires BOTH manager and HR Director approval.
- Health benefits continue only if the employee pays the full premium during the leave period (including the portion normally paid by Ridgeline).
- Extensions beyond 30 days are rare and require HR Director approval.

Procedure:

- **Step 1:** Pre-intake FMLA check. Before treating a request as personal leave, ask the employee (using the reason category framework only) whether the request might qualify for FMLA. Examples: an employee requesting "personal leave for surgery" should be handled as FMLA, not personal leave. An employee requesting "personal leave to care for a sick parent" should be handled as FMLA. Only process as personal leave if the reason is clearly outside FMLA/FAMLI qualifying categories.
- **Step 2:** Same-business-day acknowledgment using Template 26. The acknowledgment explicitly states that personal leave is discretionary and approval is not guaranteed.
- **Step 3:** Open leave_tracker.xlsx: Case ID, Leave Type = Personal Unpaid, Case Status = Pending Approval.
- **Step 4:** Forward the request to the employee's manager AND the HR Director simultaneously using Template 27. Both approvals are required.
- **Step 5:** Post to #hr-escalations: PERSONAL LEAVE REQUEST: [Employee Name], [Case ID], [Dates], [Stated Reason Category] — routed for approval.
- **Step 6:** Do NOT communicate with the employee about the outcome until both approvals are received. Do NOT speculate about whether the request will be approved.
- **Step 7:** Upon both approvals: respond using Template 28. Notify Payroll Lead via #payroll-coordination. Add return date to HR Leave Deadlines calendar. Inform the employee in writing that health benefits will continue only if they pay the full premium, and route all premium questions to Payroll Lead.
- **Step 8:** Upon denial by either approver: respond using Template 29. Close the case in leave_tracker.xlsx with Case Status = Denied. Do not disclose which approver denied the request.

12. Intermittent Leave Tracking

Intermittent leave is the most administratively demanding type of leave because every absence must be logged individually, running balances must be recalculated at each use, and patterns must be monitored for consistency with the medical certification.

12.1 Absence Intake

Intermittent absences are reported to the Leave Coordinator in one of two ways: by the employee directly (via email or phone to their manager, who then notifies the LC) or by the manager (reporting an attendance event). Either way, the LC is responsible for logging the absence within 1 business day of notification.

- **Step 1:** Verify the absence is against an active intermittent leave case in `leave_tracker.xlsx`. If no active case exists, do NOT log the absence as FMLA — instead, treat as a new intake per Section 6.
- **Step 2:** Confirm the absence reason matches the certified qualifying reason for the active case. The employee need only confirm yes or no — the LC does not ask for details.
- **Step 3:** Record the absence in `leave_tracker.xlsx` Absence Log sub-tab with the following fields: Date, Hours Used, Case ID, Reported By (employee or manager name), Notes (any relevant context, never medical).
- **Step 4:** If the absence is a partial day (e.g., 2 hours for a physical therapy appointment), log the partial hours. Do not round up to a full day.
- **Step 5:** Recalculate the Hours Used To Date and Rolling 12-Month Balance fields in the main case record per Section 8.
- **Step 6:** No Slack post is required for routine intermittent absences. Exception: if the absence pushes the employee's rolling balance below 20% remaining, post an early-exhaustion warning to #benefits-team.

12.2 30-Day Case Review

Every active intermittent case must be reviewed at least once every 30 calendar days, per Section 7 Deadline Matrix. The review is not triggered by any specific event — it is a recurring obligation managed through the HR Leave Deadlines Google Calendar.

- **Step 1:** At case opening, add a recurring calendar event: "Intermittent Case Review — [Case ID]" set to repeat every 30 calendar days until case closure.
- **Step 2:** At each review, compare actual absence frequency (from the Absence Log) against the certified frequency (from the medical certification notes in the case record).
- **Step 3:** Calculate usage variance: $(\text{actual 30-day usage} - \text{certified 30-day frequency}) \div \text{certified 30-day frequency}$. Express as a percentage.
- **Step 4:** If variance is within $\pm 50\%$ of certified frequency: the case is within expected parameters. Document "30-day review complete, within parameters" in case notes and proceed.
- **Step 5:** If variance exceeds $+50\%$ (actual usage is more than 150% of certified): flag as a pattern concern per Section 12. Escalate to Benefits Manager.

- **Step 6:** If variance exceeds –50% (actual usage is less than 50% of certified): this is typically not a concern but should still be documented. The employee may have improved or may simply not be using the available leave.
- **Step 7:** Check whether any new absences correspond to certified frequency but cluster around suspicious dates (Mondays, Fridays, days before/after holidays). Do not act on clusters independently — flag to Benefits Manager per Section 12 if a cluster pattern appears.

12.3 Certification Refresh

- If a case has been open for more than 6 months, request an updated medical certification using Template 7.
- If the original certification has an expiration date, request renewal 30 days before expiration. Add the expiration date as an event in the HR Leave Deadlines calendar when the original certification is filed.
- If the Benefits Manager authorizes a re-certification at any time (because of a pattern concern or other circumstance), follow the Benefits Manager's specific instructions.
- Do not request recertification independently based on your own suspicion of a pattern — all recertification decisions are authorized by the Benefits Manager.

12.4 Pattern Flag Triggers Specific to Intermittent Leave

- Actual usage exceeds certified frequency by more than 50% in any 30-day period.
- Absences cluster on specific days (e.g., always Mondays or always Fridays) when the certified condition does not suggest such a pattern.
- Absences cluster around holidays, paid time off periods, or the day after payday.
- A manager reports observing the employee engaged in activity inconsistent with the certified condition (e.g., recreational activity during an absence certified for a physical condition that would preclude such activity).
- The employee's use pattern has changed materially from the certified baseline.

Any of these triggers requires escalation to Benefits Manager per Section 12. The Leave Coordinator does NOT disclose pattern concerns to the manager or employee.

12. Return-to-Work Procedure and Case Closure Checklist

This section describes the generalized return-to-work procedure for all leave types, plus the mandatory case closure checklist. For FMLA-specific return-to-work rules, see Section 8. For intermittent leave, cases remain open for the duration of the certified period; closure occurs when the certification expires or the employee no longer needs the leave.

12.1 Pre-Return Checklist

Five business days before the scheduled return from any continuous leave, the Leave Coordinator must:

- Verify that fitness-for-duty certification has been received, if required for the case (see Section 8 for when FFD is required).

- Confirm the return date with the employee via email using Template 9.
- Review any work restrictions noted on the fitness-for-duty certification.
- Check that all required leave documentation is filed in the correct location (medical documents in , non-medical in the regular HR file).

Two business days before the scheduled return:

- Notify the employee's manager of the expected return date and any work restrictions using Template 12. Do NOT include the medical reason for any restrictions.
- If work restrictions exist: confirm with the manager that Ridgeline can accommodate the restrictions. If the manager indicates restrictions cannot be accommodated, ESCALATE to HR Director per Section 5.3 — this triggers an ADA-like analysis.

12.2 Day-of-Return Procedure

- **Step 1:** Manager confirms return in #leave-intake using the format: RETURN CONFIRMED: [Case ID], [Employee Name], [Return Date].
- **Step 2:** Leave Coordinator posts to #payroll-coordination with the standard leave notification format for the return event.
- **Step 3:** Leave Coordinator updates leave_tracker.xlsx: populate Actual End Date, set Case Status to "Returned — Closing".
- **Step 4:** Leave Coordinator begins the case closure checklist (Section 12).

12.3 Case Closure Checklist

Every case must complete the following checklist before being marked Closed in leave_tracker.xlsx. Missing any item is a process violation.

- ☐ Actual End Date populated in leave_tracker.xlsx.
- ☐ Case Status set to Closed.
- ☐ All medical documents filed in [Employee_ID]/ with the standard filename format.
- ☐ All non-medical documents (e.g., jury summons, military orders, bereavement documentation) filed in the employee's regular HR file.
- ☐ Fitness-for-duty certification filed (if applicable).
- ☐ Manager has confirmed return in #leave-intake (for leaves where return-to-work applies).
- ☐ Payroll Lead notified of the return date or closure via #payroll-coordination.
- ☐ Any PTO substitution reconciled with Payroll (notification posted to #payroll-coordination).
- ☐ Final rolling 12-month FMLA balance calculated and logged in the case notes (for FMLA cases).
- ☐ FAMI coordination log entry updated to reflect case closure (for FAMI cases).
- ☐ HFWA balance updated (for cases that included concurrent HFWA use).
- ☐ Case notes updated with closure date and a one-line case summary.
- ☐ All related HR Leave Deadlines calendar events cancelled or marked complete.
- ☐ Email thread moved to the Closed Cases folder per Section 13.

12.4 Failure to Return

If the employee does not return on the scheduled return date and has not contacted the Leave Coordinator, manager, or HR with a legitimate reason for extension, proceed as follows:

- **Step 1:** Do NOT assume the employee has abandoned their job. Many legitimate reasons for no-show exist, including medical emergency and communication failure.
- **Step 2:** On the day of no-show, attempt to contact the employee once using the contact preference on file (from leave_tracker.xlsx). Use Template 10.
- **Step 3:** If no response within 2 business days: ESCALATE to HR Director per Section 5.3.
- **Step 4:** Do NOT communicate with the manager about potential termination, job abandonment, or discipline. All such communications are the HR Director's responsibility.
- **Step 5:** Keep the case Open with Case Status = "Failure to Return — Escalated" until the HR Director directs closure.

12.5 Extensions Requested Before Return

- If the employee requests an extension before the scheduled return date, determine whether the extension keeps the employee within the 12-week (or 26-week military caregiver) FMLA cap.
- If the extension is within the cap: request updated medical certification using Template 7. Update Expected End Date in leave_tracker.xlsx upon receipt of the updated certification. Send updated notices to the employee and manager.
- If the extension exceeds the FMLA cap: ESCALATE to Benefits Manager per Section 5.2. Do not approve extensions beyond the cap independently.
- If the extension is for FAMLI but not FMLA (e.g., employee has FMLA remaining but needs additional weeks under FAMLI's separate cap): verify FAMLI remaining balance in famli_coordination_log.xlsx and submit an updated Employer Response via email to CDLE at claims@famli.colorado.gov if needed.

12. Denials, Disputes & Escalations

This section consolidates the denial and escalation procedures that appear in individual leave-type sections (Section 8 for FMLA, Section 9 for FAMLI, Section 9 for ADA). When any denial, dispute, or legal threat arises, consult this section alongside the specific leave-type section.

12.1 Denial Authority Recap

The Leave Coordinator's denial authority is narrow. Reference Section 5 for the full authority matrix.

- Denials the LC may issue independently: FMLA ineligibility due to tenure or hours (non-exempt employees only).
- Denials requiring Benefits Manager approval: insufficient certification, exhausted entitlement, non-qualifying reason, second/third opinion cases, HFWA classification disputes, FAMLI denials.
- Denials requiring HR Director approval: ADA-related decisions, fitness-for-duty disputes, failure-to-return cases.

- Denials requiring General Counsel consultation: any case involving mention of an attorney, EEOC, CDLE, DOL, Colorado Civil Rights Division, or lawsuit; any retaliation allegation; any case connected to active litigation.

12.2 Processing an Independent Denial

For LC-level denials only (FMLA tenure/hours ineligibility):

- **Step 1:** Confirm the specific failed criterion from employee_roster.xlsx and hours_worked_log.xlsx. For non-exempt employees, the data must be unambiguous. For exempt employees, escalate even when imputed hours appear below 1,250.
- **Step 2:** Prepare the WH-381 with Part A marked "Not Eligible" and the specific failed criterion noted in the comments field.
- **Step 3:** Send the denial using Template 3. CC the Benefits Manager.
- **Step 4:** Update leave_tracker.xlsx: Case Status = Denied, with a Notes entry explaining the basis.
- **Step 5:** Check FMLI eligibility separately — an employee ineligible for FMLA may still be eligible for FMLI. If FMLI eligibility is possible, open a concurrent FMLI case per Section 9.
- **Step 6:** Post to #leave-intake: FMLA DENIED (INELIGIBILITY): [Case ID], [Employee Name], [Failed Criterion].

12.3 Processing an Escalated Denial

For any denial above LC authority:

- **Step 1:** Prepare a case summary in leave_tracker.xlsx Notes: employee name, Employee ID, requested leave, reason category, basis for possible denial, any relevant prior communications.
- **Step 2:** Forward the email thread and case summary to the appropriate authority via the appropriate Slack channel: Benefits Manager via #benefits-team, HR Director via #hr-escalations, General Counsel via #legal-review.
- **Step 3:** WAIT for written approval before communicating with the employee. Do not speculate about the likely outcome.
- **Step 4:** When approval is received, send the denial using the appropriate template as directed by the approving authority.
- **Step 5:** Log in leave_tracker.xlsx with Case Status = Denied and the authority who approved the denial.

12.4 Employee Disputes and Reconsideration Requests

- If an employee responds challenging any denial — including LC-level denials — do NOT reply. Forward the response to the Benefits Manager and wait for direction.
- If an employee provides new information that might change the denial decision (e.g., disputes the hours worked log, provides a corrected medical certification), forward the new information to the Benefits Manager with a brief summary of what has changed. Do not attempt to resolve the dispute independently.
- If an employee requests a reconsideration in writing, forward to the Benefits Manager. The Benefits Manager decides whether reconsideration is warranted.

12.5 Legal Threats

If any of the following are present in any communication, treat them as a legal threat triggering the escalation procedure in this subsection:

- Mention of an attorney, lawyer, legal counsel, or law firm.
- Mention of EEOC, CDLE, DOL, Colorado Civil Rights Division, or any other regulatory body.
- Mention of a lawsuit, claim, or legal action (actual or threatened).
- Mention of retaliation, discrimination, or interference claims.
- Any case where the employee is simultaneously involved in active litigation with Ridgeline.

Note: A general or informational citation of a federal or state regulatory resource — for example, an employee referencing the CDLE website for accrual rates, or mentioning DOL posting requirements in passing — does not by itself constitute a legal threat. However, if the same communication also references personal legal counsel, retained representation, or an intent to file a complaint or enforcement action, the communication must be treated as a legal threat and the full escalation procedure below applies.

Procedure when a legal threat is identified:

- **Step 1:** DO NOT reply to the email under any circumstances, even to acknowledge receipt.
- **Step 2:** Post to #legal-review using the following format. For ongoing cases: LEGAL THREAT: [Employee Name], [Case ID], [Subject Line], [Brief Description] — do not reply. For new cases: LEGAL THREAT: [Employee Name], New Case, [Subject Line], [Brief Description] — do not reply.
- **Step 3:** Forward the email thread and the full case file to General Counsel (see Section 4 for current contact details) with the following subject line. For ongoing cases: “LEGAL THREAT — [Employee Name] — [Case ID]”, for new requests: “LEGAL THREAT — [Employee Name] — New Case”.
- **Step 4:** If it is an ongoing case, update leave_tracker.xlsx: Case Status = Escalated — Legal Review. If this is a new request, do not open a new case. All further communication with the employee is handled by General Counsel or as directed.
- **Step 5:** If the manager, employee, or any other party contacts the Leave Coordinator about the case after the legal escalation: do not respond. Forward all communications to General Counsel.

12. Recurring Issues & Pattern Flags

A recurring issue is a pattern of leave usage that suggests the leave case may not be operating as certified, or that the employee may have an underlying issue the current case does not address. Recurring issues require sensitive handling because they often involve medical information protected by FMLA, ADA, and GINA. The Leave Coordinator’s role is to identify patterns, document them, and escalate — never to confront the employee or inform the manager without direction.

12.1 What Counts as a Recurring Issue

- Three or more intermittent absences in a rolling 30-day window that exceed the certified frequency by more than 50%.
- Two or more separate leave cases for the same employee within 6 months involving related reasons (e.g., multiple serious health condition cases).
- A pattern of absences clustering on specific days (Mondays, Fridays, days before/after holidays or paid leave periods).

- A manager report of suspected abuse or observation inconsistent with certification (see Section 10).
- Observation by the Leave Coordinator during a routine 30-day intermittent case review (Section 12).
- Any pattern where the employee's actual use diverges substantially from the certified baseline.

12.2 Pattern Flag Procedure

- **Step 1:** Identify the specific pattern and the supporting data from leave_tracker.xlsx and leave_history.xlsx. Do not rely on impression — calculate actual usage and compare to certified frequency.
- **Step 2:** Document the pattern in leave_tracker.xlsx case notes. Be specific: date range, number of absences, certified frequency, actual frequency, any observed clustering.
- **Step 3:** Post to #hr-escalations using the format: RECURRING ISSUE: [Employee Name], [Case ID], [Pattern Description], [Data Points] — please review.
- **Step 4:** Forward any relevant email thread (e.g., a manager report that triggered the flag) to the Benefits Manager with subject line "RECURRING ISSUE — [Case ID]".
- **Step 5:** Add a case note entry: "Pattern flagged [date] — [description] — escalated to Benefits Manager per Section 12."
- **Step 6:** Do NOT communicate the flag to the employee, their manager, or any other party. Pattern information is medical-related and confidential.
- **Step 7:** Wait for direction from the Benefits Manager before taking any further action on the case.

12.3 Possible Benefits Manager Responses

The Benefits Manager may direct any of the following, based on the specific pattern:

- No action — the pattern is consistent with the certification within normal variance. Document the decision in case notes.
- Updated medical certification — the LC requests updated certification per Section 12 using Template 7.
- Second opinion — the Benefits Manager may direct that Ridgeline seek a second opinion at Ridgeline's expense. This is rare and is handled by the Benefits Manager, not the LC.
- Re-interview with the employee to clarify the condition or frequency — handled by the Benefits Manager.
- Escalation to HR Director for discipline review — only in extreme cases involving suspected fraud, and handled by the Benefits Manager and HR Director together.

12.4 Confidentiality of Pattern Information

Pattern information is derived from medical certifications and absence data, both of which are protected health and leave information. The following rules are absolute:

- Never disclose a pattern flag to the employee's manager without explicit Benefits Manager approval.
- Never discuss pattern concerns with the employee without Benefits Manager direction.

- Never include pattern details in any Slack post or email outside of the approved escalation chain (#hr-escalations, #benefits-team, #legal-review).
- Never place pattern documentation in the employee's general personnel file. All pattern-related notes live in leave_tracker.xlsx case notes and in as needed.
- Never suggest to any party that the employee's leave usage is suspicious, even in casual conversation.

13. Confidentiality & File Handling

Leave administration involves protected health information, genetic information, disability information, and other sensitive employee data. Confidentiality is not optional — it is a legal requirement under FMLA, ADA, GINA, HIPAA (when applicable), and Colorado law. This section defines the file structure, access rules, and communication limits that protect employee privacy.

13.1 Medical File Separation

- All medical information must be stored in [Employee_ID]/ with restricted access.
- Access to is limited to: HR Director, Benefits Manager, and Leave Coordinator. No other role has access, including HR Generalists, Payroll Lead, Safety Coordinator, IT, or managers.
- Medical information includes: completed medical certifications (WH-380-E, WH-380-F), fitness-for-duty certifications, ADA intake documents, accommodation documentation, health-related emails between the employee and the LC, and any notes derived from medical information.
- Non-medical leave documents (bereavement documentation, jury summons, military orders, leave approval letters) are stored in the employee's regular HR file, NOT in .
- File naming conventions: [Document Type]_[Case ID]_[Date].pdf. Example: WH-380-E_LC-2025-0342_20250420.pdf.

13.2 Email Confidentiality

- Never include medical details, diagnoses, or protected health information in the body of any email. References to a case by Case ID and general type (e.g., "FMLA") are permissible; references to the underlying condition are not.
- Never CC anyone outside the HR team (HR Director, Benefits Manager, HR Generalists, Payroll Lead, Safety Coordinator, General Counsel) on a case-related email. Managers receive their own notifications via Template 11, which does not include medical details.
- Never forward an email thread containing medical information beyond the HR team without explicit authorization from the Benefits Manager.
- If an employee sends an email containing more medical detail than needed, do not reply to the thread with that detail quoted. Start a new thread if needed, or reply with the detail redacted.
- Never use the employee's personal email to discuss case details unless the employee has specifically requested it AND the email does not contain medical details.

13.3 Slack Confidentiality

- Never post medical details, diagnoses, or protected health information in any Slack channel, including #hr-escalations and #benefits-team.
- Case notifications in Slack must be limited to Case ID, leave type (general category), priority, and the minimum information needed for the intended audience.
- Never tag managers or non-HR roles in #leave-intake or any other case-related channel. Managers receive notifications via email templates, not Slack.
- Direct messages about cases are prohibited. All case communication must happen in the designated channels where it is auditable.

13.4 Verbal Confidentiality

- Do not discuss specific cases in open offices, hallways, break rooms, or any location where others may overhear.
- Do not acknowledge another employee's leave status to coworkers or any party outside the HR team. The correct response to "is [Employee] on leave?" is: "I'm not able to discuss other employees' status. If you need to reach them, please use the appropriate channel."
- Never confirm or deny leave status to external callers, vendors, references, background checkers, or family members (except as specifically authorized by the employee).
- If an employee's spouse, parent, or other family member contacts the Leave Coordinator claiming to act on the employee's behalf: do not disclose any information. Ask them to have the employee contact you directly.

13.5 Records Retention

- Leave case files are retained per Ridgeline's records retention policy (Handbook §9.3): 7 years from case closure for FMLA/FAMLI cases, 5 years for ADA cases, 4 years for other leave types.
- Medical records are retained separately from non-medical records per the file-separation rules in Section 13.
- Do not delete any case file without written authorization from the Benefits Manager.
- When retention periods expire, case files are destroyed per the HR Director's annual retention review. The Leave Coordinator does not independently destroy files.

13.6 GINA Compliance

The Genetic Information Nondiscrimination Act prohibits the collection and use of genetic information, including family medical history, in most employment decisions. FMLA medical certifications occasionally include such information inadvertently.

- When requesting medical certification, use only the standard DOL forms (WH-380-E, WH-380-F). Do not add custom questions that could elicit genetic information.
- If a returned medical certification contains family medical history, genetic test results, or other GINA-protected information: do not retain the original PDF in the standard case file. PDF redaction requires specialized tools and is error-prone, so do NOT attempt to redact the PDF directly.
- Instead, create a sanitized text summary as a .docx file containing only the FMLA-relevant fields: employee name, Case ID, leave start and end dates, certified frequency (for intermittent), expected duration, and confirmation that a provider's signature is

present. Do NOT transcribe medical descriptions, diagnoses, family history, or any other clinical content. Save the summary as [Case ID]_cert_summary.docx in [Employee_ID]/.

- Forward the original PDF (with the GINA-protected information intact) to General Counsel (Evelyn Marchetti) at evelyn.marchetti@ridgelineholdings.com with subject line "GINA — Original Medical Cert — [Case ID]". General Counsel will store and dispose of the original per legal requirements. Do NOT keep a local copy of the original PDF in the standard case folder.
- Add a case note: "GINA-protected content received [date]; sanitized summary saved as [Case ID]_cert_summary.docx; original forwarded to General Counsel." Reference only the sanitized .docx in all subsequent case actions.
- Escalate any GINA concern to General Counsel per Section 5.4, particularly if the employee raises a GINA question or if the extra information appears intentional rather than incidental.
- Never ask the employee or the provider follow-up questions about family medical history, even if the information would appear relevant to the case.

13. Quality Controls

This document is maintained by the Benefits Manager and reviewed annually. Changes to this document require approval from both the HR Director and, for any change affecting legal compliance, General Counsel.

- Annual review: This SOP is reviewed each April by the Benefits Manager and HR Director. The next scheduled review is April 1, 2026.
- Legal-change review: If any federal or Colorado law affecting FMLA, FAMILI, HFWA, ADA, USERRA, or related areas is amended, this SOP must be updated within 30 calendar days of the change's effective date. The Benefits Manager is responsible for monitoring legal changes via CDLE bulletins, DOL newsletters, and Ridgeline's employment counsel.
- Policy-change review: If any Ridgeline policy affecting leave (PTO, bereavement, personal leave, handbook references) is amended, this SOP must be updated within 14 calendar days of the policy change.
- Case audit: The Benefits Manager conducts a quarterly audit of open and recently closed cases to verify SOP compliance. The audit includes: sampling of 10 closed cases, verification of deadline adherence, verification of file filing locations, review of Slack posts for confidentiality compliance, and review of case notes for completeness.
- SOP change log: Every change to this document is logged in the SOP Change Log maintained by the Benefits Manager. The log records the date, the change, the approver, and the reason.
- Approval requirements: All changes require Benefits Manager drafting, HR Director approval, and (for compliance-related changes) General Counsel review. Emergency changes (e.g., immediate legal change) may be implemented by the Benefits Manager with HR Director verbal approval and General Counsel review within 7 days.

13. Email Housekeeping

After processing every leave-related email, the Leave Coordinator must complete the housekeeping actions below. Email discipline is critical for confidentiality compliance and for workflow continuity when the Leave Coordinator is out of office.

13.1 General Rules

Rule	Action
Mark as read	Every processed email must be marked as read, without exception. Unread emails signal unprocessed work; never leave a processed email marked unread.
P1 / P2 emails	Leave in the Inbox and flag as important. Do NOT move to a folder until the underlying case is fully resolved or closed.
P3 / P4 emails	Move to the matching folder (see Section 13) after initial processing. Do not flag.
Multi-topic emails	File in the folder matching the highest-priority topic. If topics are equal priority, use the folder listed first in Section 13.
Medical content	Never retain medical details in email. Extract and file per Section 13, then keep only the administrative metadata in the email archive.
Unknown senders	After posting to #unknown-senders-hr and forwarding to Benefits Manager, move the email to the Unknown Senders folder.
Manager notifications	After sending, move the outgoing email to the matching case folder. Do not keep manager notifications in the Sent Items folder.

13.2 Email Folders

Folder Name	Use For
FMLA Cases	All FMLA-related emails (intake, certification, designation, tracking, closure) for currently open FMLA cases.
FAMLI Cases	All FAMLI-related emails for currently open FAMLI cases. If FMLA + FAMLI concurrent, file in FMLA Cases and cross-reference in the FAMLI coordination log.
ADA Intake	All ADA accommodation request emails, from intake through routing to HR Director. Any subsequent correspondence after HR Director handoff is owned by the HR Director, not the LC.
HFWA & Paid Leave	HFWA sick leave, company PTO, bereavement, and jury duty correspondence.
Personal/Military Leave	USERRA cases and personal unpaid leave cases.

Folder Name	Use For
Closed Cases	Any case correspondence for a case with Case Status = Closed in leave_tracker.xlsx. Move the full email thread to this folder at case closure per Section 12.
Unknown Senders	Emails from senders not found in employee_roster.xlsx, after posting to #unknown-senders-hr.
General	Non-case correspondence, feedback, compliments, and administrative emails not related to a specific case.

Folder names must match exactly as listed. Do not create new folders or use variations. Sub-folders within these top-level folders are not permitted — the Case ID in the email subject line is sufficient for navigation within a folder.

13. Email Templates & Scripts

All employee, manager, and internal communications use the templates below. These templates exist to ensure consistency, completeness, and confidentiality compliance. The Leave Coordinator must follow these rules without exception:

- Use templates as written. Personalize the greeting only.
- Replace all [bracketed] placeholders with confirmed information before sending. Never send a template that contains an unfilled placeholder.
- Do not add medical details, diagnoses, or other protected health information to any template.
- Do not delete sections of a template. If a section does not apply, omit only the optional bracketed sub-sections clearly marked with conditional language (e.g., "[If FFD required: ...]").
- Do not invent new templates. If a situation arises that is not covered by an existing template, escalate to the Benefits Manager rather than drafting your own communication.
- All employee-facing templates close with the standard signature block: "Best regards," / "Ridgeline Gear Co. — Leave Coordinator" / "leaves@ridgelinegear.com". Manager-facing templates use the same signature.

Template 1 — Intake Information Request

Hi [First Name],

Thanks for reaching out about your leave. To open your case, I need a few additional details. Please reply with the following:

[List each missing field specifically, e.g., "Requested leave start date," "Continuous or intermittent," "Manager's name"]

Once I have this information, I will open your case and confirm next steps. If your situation is urgent, please let me know in your reply.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 2 — FMLA Eligibility Notice (Eligible)

Hi [First Name],

Thank you for submitting your FMLA leave request. I have reviewed your eligibility and confirmed that you ARE eligible for FMLA leave under all three federal eligibility criteria as of your requested leave start date of [Start Date].

Attached is your official Notice of Eligibility and Rights & Responsibilities (DOL Form WH-381), which explains your rights and obligations under FMLA. Please read it carefully.

To complete your FMLA designation, I also need a medical certification from your healthcare provider. Please find attached the appropriate certification form ([WH-380-E for your own condition / WH-380-F for a family member's condition]). The completed certification is due by [Cert Due Date — 15 calendar days from today].

If the certification is not returned by the due date, your leave may be denied. If you anticipate any difficulty obtaining the certification by the deadline, please reply to this email so we can discuss.

Case ID: [Case ID]

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 3 — FMLA Ineligibility Notice

Hi [First Name],

Thank you for submitting your FMLA leave request. I have reviewed your eligibility against the federal FMLA criteria and unfortunately must inform you that you are NOT currently eligible for FMLA leave for the following reason:

[Specific failed criterion. Examples: "Tenure: FMLA requires at least 12 months of employment with Ridgeline. Your current tenure as of [requested start date] is [X months, Y days]." OR "Hours: FMLA requires at least 1,250 hours worked in the 12 months immediately preceding the leave start date. Your hours worked in that period are [X], which is below the threshold."]

Attached is the official Notice of Eligibility (DOL Form WH-381) reflecting this determination.

Even though you are not eligible for FMLA, you may still be eligible for leave under Colorado FAMLI, which has different eligibility criteria (no tenure requirement, no minimum hours requirement). If you would like, I can review your FAMLI eligibility for the same leave reason — please reply to this email to let me know.

If you believe this FMLA determination is in error, please reply to this email and I will review.

Case ID: [Case ID]

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 4 — FMLA Designation Notice

Hi [First Name],

I have reviewed the medical certification you provided for your FMLA leave request. I am writing to confirm that your leave has been DESIGNATED as FMLA-qualifying.

Case ID: [Case ID]

Leave start date: [Start Date]

Expected end date: [Expected End Date]

Total FMLA time designated: [Hours / Weeks]

Leave format: [Continuous / Intermittent / Reduced Schedule]

[For intermittent only: Certified frequency: as documented on the medical certification]

[If fitness-for-duty required: A fitness-for-duty certification will be required from your healthcare provider before you may return to work. I will send a reminder before your scheduled return date.]

Attached is your official Designation Notice (DOL Form WH-382).

Your remaining FMLA entitlement after this leave will be approximately [Remaining Hours] in your rolling 12-month period.

If your leave also qualifies under Colorado FAMLI, both programs run concurrently. You will receive a separate confirmation about FAMLI coordination if applicable.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 5 — Medical Certification Incomplete

Hi [First Name],

Thank you for submitting your medical certification for case [Case ID]. The certification I received is INCOMPLETE. The following fields must be filled in by your healthcare provider before I can process your leave designation:

[List each specific missing or unsigned field, e.g., "Section 4: probable duration of the condition" / "Provider signature on page 4"]

Per FMLA regulations, you have 7 calendar days from receipt of this email to provide the completed certification. The new due date is [Cure Due Date].

If you need assistance contacting your provider or have questions about the missing information, please reply to this email.

I cannot complete the FMLA designation of your leave until the complete certification is received.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 6 — Medical Certification Reminder

Hi [First Name],

This is a friendly reminder that the medical certification for your FMLA case [Case ID] is due by [Due Date], which is [X] calendar days from today.

If you have not yet contacted your healthcare provider, please do so as soon as possible. The certification form ([WH-380-E or WH-380-F]) was sent to you on [Original Send Date].

If you anticipate any delay in obtaining the certification, please reply to this email so we can discuss options. Note that if the certification is not received by the due date, your FMLA leave request may be denied.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 7 — Medical Certification Renewal/Extension Request

Hi [First Name],

Your FMLA case [Case ID] requires updated medical certification at this time.

[For renewal: Per Ridgeline policy, FMLA cases that have been open for more than 6 months require updated certification to confirm the ongoing need for leave.]

[For extension: You have requested an extension of your current FMLA leave, and updated certification is required to support the extension.]

Please find attached a blank certification form ([WH-380-E or WH-380-F]). The completed certification is due by [Due Date — 15 calendar days from today].

Once received, I will update your case file and confirm next steps. If you have questions about completing the certification, please reply to this email.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 8 — Fitness-for-Duty Reminder

Hi [First Name],

This is a reminder that a fitness-for-duty certification is required before your return to work from FMLA case [Case ID], which is currently scheduled for [Return Date].

Please obtain a fitness-for-duty certification from your healthcare provider confirming that you are able to return to work. The certification need only address whether you can perform the essential functions of your job, with or without restrictions.

Please provide the certification by reply to this email no later than [Return Date minus 1 business day]. Without it, you may not be able to return to work as scheduled.

If your provider needs more information about your job's essential functions, please reply to this email and I will arrange for that information to be provided.

Best regards,

Ridgeline Gear Co. — Leave Coordinator
leaves@ridgelinegear.com

Template 9 — Return Confirmation

Hi [First Name],

I am writing to confirm your scheduled return to work from leave case [Case ID]:

Return date: [Return Date]

[If FFD required: Please note that a fitness-for-duty certification is required before your return. If you have not yet provided this, please reply to this email as soon as possible.]

[If work restrictions exist: Your fitness-for-duty certification includes the following restrictions: [Restrictions]. I have notified your manager.]

Please reply to confirm that the return date works for you, or to let me know if anything has changed.

Best regards,

Ridgeline Gear Co. — Leave Coordinator
leaves@ridgelinegear.com

Template 10 — Return Follow-Up (No-Show)

Hi [First Name],

I am writing because we expected your return to work from leave case [Case ID] today, [Date], and have not yet received notification of your arrival.

I want to make sure you are okay. Please reply to this email or contact your manager as soon as possible to let us know your status. If you need additional time, we may be able to discuss options depending on your circumstances.

If we do not hear from you by [2 business days from this email date], we will need to escalate your case for further review.

Best regards,

Ridgeline Gear Co. — Leave Coordinator
leaves@ridgelinegear.com

Template 11 — Manager Leave Notification

Hi [Manager Name],

I am writing to notify you that one of your team members will be on approved leave. Please use this notification to plan workload coverage.

Employee: [Employee Name]

Leave type (general category only): ["approved leave" / "FMLA leave" / "FAMLI leave" / "bereavement leave" / "jury duty" / etc. NEVER include the medical reason.]

Start date: [Start Date]

Expected end date: [End Date or "to be confirmed"]

Leave format: [Continuous / Intermittent / Reduced Schedule]

[For intermittent only: General frequency range, e.g., "approximately 2-3 days per month" — NEVER the verbatim certified frequency.]

[If known and applicable: Work restrictions upon return: [General description].]

For all questions about this leave, please contact me directly at leaves@ridgelinegear.com. Please do NOT contact the employee about work matters during their leave except in genuine operational emergency.

[For intermittent: Please log each intermittent absence in the attendance system and notify me via email.]

[For continuous: I will be in touch closer to the return date to coordinate.]

CONFIDENTIALITY REMINDER: medical information about your team members is confidential under federal and Colorado law. Please do not share this notification with other team members or discuss the reason for the leave with anyone.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 12 — Return-to-Work Manager Notification

Hi [Manager Name],

I am writing to notify you of an upcoming return from leave for one of your team members:

Employee: [Employee Name]

Case ID: [Case ID]

Return date: [Return Date]

[If applicable: Work restrictions: [List restrictions, e.g., "no lifting over 15 pounds for 4 weeks"]]

[If FFD with restrictions: Please confirm by reply that the listed restrictions can be accommodated in the employee's role. If they cannot be accommodated, contact me immediately and I will route to the HR Director.]

[If no restrictions: No work restrictions apply.]

The employee will return to their regular role and duties unless we have discussed otherwise. Please confirm in #leave-intake on the day of return that the employee has reported as scheduled.

CONFIDENTIALITY REMINDER: do not share medical information about the leave with the employee's coworkers or discuss the reason for the leave with anyone.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 13 — Manager Information Response

Hi [Manager Name],

Thank you for your question about [Employee Name]'s leave. I can confirm the following:

[Provide ONLY the information the manager is entitled to per Section 10: dates, leave format (continuous/intermittent), general frequency range for intermittent, work restrictions if applicable. NEVER include medical details, diagnosis, treatment, or family member identity.]

If you have additional questions about scheduling or work coverage, please let me know and I will help. For confidentiality reasons, I am not able to share medical details about the leave or the underlying reason.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 14 — Manager Medical-Information Decline

Hi [Manager Name],

Thank you for reaching out about [Employee Name]. Unfortunately, I am not able to share the specific information you requested. Medical details and the underlying reason for an employee's leave are confidential under federal FMLA, the ADA, GINA, and Colorado law. I am not permitted to disclose them to anyone outside the HR team, including the employee's direct manager.

What I CAN share with you is the following: [Provide only what the manager is entitled to per Section 10: dates, leave format, work restrictions if applicable.]

If you have an operational question about scheduling, work coverage, or returning the employee to duty, I am happy to help. Please contact me at leaves@ridgelinegear.com.

I appreciate your understanding. The confidentiality protections exist to protect every employee, and they apply equally regardless of role or relationship.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 15 — Manager Pattern Response

Hi [Manager Name],

Thank you for letting me know about your observations regarding [Employee Name]'s recent absences. I have reviewed the case and can confirm that the absences you described are within the approved limits of the employee's certified leave.

I am not able to share the specific certified frequency or the medical reason for the leave — these are confidential. If you have specific operational concerns about scheduling or work coverage, please let me know and I will work with you on a path forward.

Please do NOT discipline, counsel, or formally document the employee for absences that are part of their approved protected leave. Doing so could constitute interference under the FMLA or FAMLI and create significant legal exposure for Ridgeline. If you have concerns about the employee's work performance unrelated to the protected absences, please document those separately and contact the HR Director directly.

If you would like to discuss this further, please reply to this email or reach out to the HR Director.

Best regards,
Ridgeline Gear Co. — Leave Coordinator
leaves@ridgelinegear.com

Template 16 — Payroll Handoff (Employee)

Hi [First Name],

Thank you for your question about [topic — e.g., "pay during your leave" / "PTO substitution" / "health insurance premiums" / "FAMLI wage replacement amount"]. Questions about pay, benefits, deductions, premium billing, and tax matters during leave are handled by our Payroll Lead, Teresa Vang.

I have forwarded your question to Teresa, and she will respond to you directly within [1–2 business days]. You can also reach her at teresa.vang@ridgelinegear.com.

In the meantime, your leave case is moving forward as planned. Please let me know if you have any questions about the leave process itself, as opposed to pay or benefits.

Best regards,
Ridgeline Gear Co. — Leave Coordinator
leaves@ridgelinegear.com

Template 17 — Manager Payroll Handoff

Hi [Manager Name],

Thank you for your question about how [Employee Name]'s leave affects payroll. Payroll coding, paycheck impacts, PTO accrual during leave, premium billing, and similar questions are handled by our Payroll Lead, Teresa Vang, rather than by my role.

I have forwarded your question to Teresa, and she will respond to you directly. You can also reach her at teresa.vang@ridgelinegear.com.

If you have other questions about scheduling, return-to-work coordination, or work coverage during the leave, please contact me directly.

Best regards,
Ridgeline Gear Co. — Leave Coordinator
leaves@ridgelinegear.com

Template 18 — FAMLI Concurrent Designation

Hi [First Name],

I am writing to confirm that I have received the notice from CDLE about your Colorado FAMLI claim. I have submitted Ridgeline's Employer Response and confirmed the following:

FAMLI Claim ID: [Claim ID]

Case ID at Ridgeline: [Case ID]

Concurrent FMLA designation: [Yes / No]

[If Yes: Because your leave qualifies under both FMLA and FAMLI, both programs will run concurrently.]

[If No, FAMLI only: Your leave is being administered under Colorado FAMLI. You do not currently have a concurrent FMLA case open.]

Wage replacement under FAMLI is paid by the State of Colorado, NOT by Ridgeline. All questions about your FAMLI wage replacement amount, payment timing, and tax treatment should be directed to CDLE directly at claims@famli.colorado.gov. I cannot answer those questions.

If you have questions about Ridgeline's role in coordinating your leave, please contact me directly. If you have questions about pay or benefits, please contact our Payroll Lead, Teresa Vang, at teresa.vang@ridgelinegear.com.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 19 — ADA Acknowledgment

Hi [First Name],

Thank you for reaching out about a workplace accommodation. I have received your request and have routed it to our HR Director, Daniel Whitfield, who handles all accommodation requests at Ridgeline.

Daniel will be in contact with you to begin a discussion about your needs. This conversation is called the "interactive process," and it is a collaborative discussion between you and the HR Director to identify potential accommodations that may help you perform the essential functions of your job.

In the meantime, please feel free to reply to this email with any additional information you would like to provide. You do NOT need to share any specific medical details with me — those will be discussed directly with Daniel as part of the interactive process, and only to the extent necessary to evaluate your request.

Daniel will contact you within [2–3 business days].

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 20 — HFWA Balance Response

Hi [First Name],

Thank you for your question about your HFWA sick leave balance. As of today, [Date], your balance is:

YTD Accrued: [Hours]

YTD Used: [Hours]

Current Available Balance: [Hours]

You accrue 1 hour of HFWA sick leave for every 30 hours you work, up to a maximum of 48 hours per calendar year. Your balance carries over to the next year, also capped at 48 hours.

If you would like to use HFWA sick leave for an absence, no advance notice is required for an unforeseeable need (such as illness). For foreseeable needs (such as a scheduled medical appointment), please give your manager and me as much notice as you reasonably can.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 21 — HFWA Documentation Request

Hi [First Name],

Thank you for letting me know about your absence covered by HFWA sick leave. Because the absence has lasted [X] consecutive workdays, Colorado HFWA permits Ridgeline to request documentation of the qualifying reason.

Please provide one of the following at your earliest convenience:

- A note from a healthcare provider confirming you (or your family member) sought care during the absence
- A general statement that the absence was for one of the qualifying HFWA reasons (your or a family member's illness, injury, preventive care, public health emergency, or safe leave)

You do NOT need to disclose the specific medical condition or diagnosis. A general statement that the absence was for a qualifying reason is sufficient under Colorado law.

Please reply to this email with the documentation when you have it.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 22 — PTO Substitution Acknowledgment

Hi [First Name],

Thank you for letting me know that you would like to substitute your accrued PTO during the unpaid portion of your leave (case [Case ID]).

I have notified our Payroll Lead, Teresa Vang, of your request. Teresa will handle the actual application of PTO to your leave period and will contact you directly with any questions about your PTO balance, the duration of substitution, or how PTO interacts with FMLI wage replacement (if FMLI applies to your case).

If you have specific questions about how the PTO substitution works in your situation, or about the dollar amount of your paychecks during this time, please reach out to Teresa at teresa.vang@ridgelinegear.com.

Your leave case continues as planned.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 23 — Bereavement Acknowledgment

Hi [First Name],

I am very sorry for your loss. I want to confirm that I have received your bereavement leave request and have logged the following:

Case ID: [Case ID]

Leave start date: [Start Date]

Leave end date: [End Date]

Total bereavement leave: [3 days for immediate family / 1 day for extended family]

Your manager has been notified that you will be out, with no medical or personal details disclosed.

Per Ridgeline policy, please provide documentation (an obituary, death certificate, or funeral program) within 30 calendar days. I have set a reminder for [Date 30 days from loss].

If you need additional time beyond your bereavement allowance, please let me know and we can discuss options including PTO supplementation or unpaid leave.

Please take care of yourself during this difficult time.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 24 — Bereavement Reclassification

Hi [First Name],

I am writing about your bereavement leave case [Case ID], which began on [Start Date]. Per Ridgeline policy, bereavement leave requires documentation (an obituary, death certificate, or funeral program) within 30 calendar days of the loss. The 30-day window has now passed and I have not received documentation.

Per policy, I am reclassifying the leave as PTO.

If you are still able to provide documentation, please reply to this email and I will reach back out to discuss whether the reclassification can be reversed.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 25 — Military Leave Acknowledgment

Hi [First Name],

Thank you for letting me know about your upcoming military service. I have received your request and have logged the case in our system.

Military leave under USERRA involves specific rights and processes — including pay continuation considerations, benefits continuation, and reemployment rights upon return — that

are handled by our Benefits Manager, Renata Okafor, rather than by my role. I have routed your request to Renata, and she will be in contact with you directly to discuss next steps.

If you have orders or other documentation related to your service that you can share now, please reply to this email so I can include them in the case file.

Thank you for your service.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 26 — Personal Leave Acknowledgment

Hi [First Name],

Thank you for your personal unpaid leave request. I want to be transparent with you about how this process works.

Personal unpaid leave under Ridgeline policy (Handbook §4.8) is discretionary and is not guaranteed. It requires approval from BOTH your direct manager AND our HR Director. I have forwarded your request to both for review.

While you wait for a decision, please note:

- Personal leave is unpaid.
- If approved, your health benefits will continue only if you pay the full premium during the leave (including the portion normally paid by Ridgeline). Our Payroll Lead can provide details if your leave is approved.
- The maximum personal leave duration under our policy is 30 calendar days.

I will contact you as soon as I have a decision from both approvers — typically within [3–5 business days]. In the meantime, if your situation involves a medical reason for you or a family member, military service, or another protected leave reason, please let me know. You may be eligible for FMLA, FAMLI, or another protected leave that I have not yet evaluated for your case.

Case ID: [Case ID]

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 27 — Personal Leave Routing (to Manager and HR Director)

Hi [Manager Name] and Daniel,

I am routing a personal unpaid leave request for your review and decision. Both your approvals are required per Section 11 of the Leave Coordinator SOP.

Employee: [Employee Name]

Case ID: [Case ID]

Requested dates: [Start Date] through [End Date]

Total: [X] calendar days

Stated reason category: [General reason category only — NOT medical detail]

Please reply to this email with your decision (approve / deny) at your earliest convenience. I have informed the employee that approval is not guaranteed and that they should expect a response within [3–5 business days].

If you need additional information to make your decision, please let me know and I will request it from the employee.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 28 — Personal Leave Approved

Hi [First Name],

I am writing to confirm that your personal unpaid leave request has been approved by both your manager and the HR Director.

Case ID: [Case ID]

Approved leave start date: [Start Date]

Approved leave end date: [End Date]

Total: [X] calendar days

A few important reminders:

- Your leave is unpaid for the full duration.
- Your health benefits will continue during the leave only if you pay the full premium each month, including the portion normally paid by Ridgeline. Our Payroll Lead, Teresa Vang, will contact you separately about premium payment arrangements.
- If your situation changes and you cannot return on the scheduled date, please contact me as soon as possible. Extensions beyond the approved end date are not guaranteed and require renewed approval from your manager and the HR Director.
- Your scheduled return date is [Return Date].

Please reply to confirm receipt and acknowledge the unpaid status and premium payment requirement.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 29 — Personal Leave Denied

Hi [First Name],

I am writing to let you know that your personal unpaid leave request has not been approved at this time.

Personal leave under Ridgeline policy is discretionary and requires approval from both your manager and the HR Director. I am not able to share the specific reasons for the decision.

If your underlying need involves a medical reason (your own or a family member's), military service, jury duty, bereavement, or another reason that may be covered by federal or Colorado

leave law, please let me know. You may be eligible for protected leave under FMLA, FAMILI, USERRA, HFWA, or another statute that I have not yet evaluated for your case. Many leave situations qualify for protected leave even when personal leave is not approved.

If you have questions about the personal leave decision specifically, you may contact your manager or the HR Director directly.

Case ID: [Case ID]

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

Template 30 — Bereavement Not Covered (Non-Qualifying Relationship)

Hi [First Name],

Thank you for letting me know about your loss, and please accept my sincere condolences.

I want to be transparent with you: Ridgeline's bereavement leave policy (Handbook §4.5) covers only specific family relationships, and based on the relationship you described, this loss falls outside the policy's coverage. The covered relationships are:

- Immediate family (3 days): spouse, domestic partner, parent, child, sibling
- Extended family (1 day): grandparent, grandchild, in-laws (parent, child, or sibling of spouse), aunt, uncle, niece, nephew

I am not able to approve bereavement leave for this case. However, I want to help you take the time you need. You may be able to use one of the following alternatives:

- Accrued PTO: please contact your manager for approval and Payroll Lead Teresa Vang (teresa.vang@ridgelinegear.com) for your current balance.
- Personal unpaid leave: please reply to this email if you would like to request this. Personal leave is unpaid and discretionary, requiring manager and HR Director approval, but is often granted for circumstances like this.

I am sorry I cannot offer bereavement leave specifically, and I am sorry for your loss. Please reply if you would like to pursue one of the alternatives, and I will help you start that process.

Best regards,

Ridgeline Gear Co. — Leave Coordinator

leaves@ridgelinegear.com

— End of Ridgeline Leave Coordinator SOP —