

# Leave of Absence: A Comprehensive Guide



## Introduction

Taking a leave of absence can be necessary if you need time away from work due to personal, medical, or other significant reasons. This brochure aims to provide a clear understanding of the leave of absence process, including eligibility criteria, application procedures, and coordination with other policies and state-provided benefits. This guide addresses only those leaves of absence administered by Lincoln Financial. For information about leaves not covered by this brochure, please [raise a ticket via myHelp](#) or speak with your HR Business Partner.

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# Types of Leave Administered by Lincoln Financial

There are several types of leaves of absence that employees may request through Lincoln Financial.

## Disability

Disability provides all or part of your pay if you are unable to perform your job because of a non-work-related illness or injury. Short-term disability (STD) and company-provided long-term disability (LTD) coverage through Pearson requires no enrollment so the coverage is automatic. You may choose to purchase an additional 10% of LTD. You can read the [STD policy](#) or the [LTD Summary Plan Description](#) for more information.

### STD Benefit

- **Weeks paid at 100%:** first 14 weeks
- **Weeks paid at 66.67%:** remaining 12 weeks

### LTD Benefit

- **Base:** pays 50% of salary up to \$20,833 per month
- **Buy-up:** pays an additional 10% up to \$25,000 per month

## Parental Leave

Pearson's [Parental Leave policy](#) (sometimes referred to as "Bonding") provides employees 100% of pay up to 16 weeks of paid time off during a 12-month period to care for a child after birth or placement for adoption or foster care, including birth via gestational surrogate. Parental Leave can only be taken as two (2) 8-week increments or as one (1) 16-week increment. Parental Leave that is not taken in the prescribed increments will be forfeited.

[PERKY](#) can model your maternity and parental leave to help you understand how Pearson leave policies, federal benefits, and state benefits interact with each other. Just provide a few pieces of information to model your potential leave.

## Serious Illness in the Family Leave (SIL)

The [Serious Illness in the Family Leave policy](#) provides employees 100% of pay up to four (4) weeks of paid time off during a 12-month period for the care of a seriously ill spouse or domestic partner, child, parent, in-laws, or to make arrangements for a relative to that care. SIL can only be taken in one-week increments. SIL that is not taken in the prescribed increments will be forfeited.

## Family Medical Leave (FMLA)

FMLA or Family Medical Leave Act of 1993 (FMLA) and related state or local statutes provides employees up to 12 weeks of unpaid medical and family leave during a 12-month period, if eligible, for any one or more of the following reasons:

1. to care for a child after birth or placement for adoption or foster care;
2. to care for a spouse, child, or parent (not in-laws) who has a serious health condition;
3. where a serious health condition renders you unable to perform the functions of your job;
4. for family members of armed services personnel called up to active duty under certain circumstances;
5. caregiver leave up to 26 weeks for employees caring for family members injured while on covered active duty in the US Armed Forces (including the National Guard or Reserves), or veterans with serious illnesses or injuries.

In addition, Pearson provides FMLA-like benefits for opposite- and same-sex partners and children of opposite- and same-sex partners. Read the full [FMLA policy](#) for more information.



## How Does FMLA Coordinate with Pearson's Paid Leaves of Absences and State Leaves?

When eligible for FMLA, this time will run concurrently for a 12-week period with disability and other paid leaves. When you initiate a claim for disability, serious illness in the family leave, or parental leave, you will be prompted to open an FMLA claim.

## Worker's Compensation and FMLA

Employees involved in a work-related accident or illness should report that accident to their manager. If a work-related injury requires a leave resulting in receipt of worker's compensation benefits, that leave shall be considered FMLA leave under Federal Law. Employees must report all time missed from work due to a worker's compensation claim to Lincoln Financial as FMLA.

## Intermittent FMLA

FMLA may be taken on an intermittent or reduced schedule when medically necessary. Employees utilizing intermittent FMLA leave must notify the Lincoln Financial Leave Management Unit for each Intermittent instance at 1-800-213-7327 or visit [MyLincolnPortal.com](https://www.lincolncapital.com) and within two days after returning to work or the leave could be denied. First-time users must register using company code: PEARSON.

Employees taking intermittent FMLA leave must make a reasonable effort to schedule their leave so as not to unduly disrupt the Company's operations. [Read the FMLA policy](#) for more information.



## Eligibility Criteria

To qualify for a leave of absence, employees must meet certain eligibility criteria which include:

### Employment status

Full-time employees and part-time employees working 20 hours or more per week are eligible for the paid leaves described in this brochure. Limited-term employees are not eligible for short- and long-term disability.

### Length of employment

Employees are required to have been employed for:

- Thirty (30) days to be eligible for STD;
- One (1) year and have worked at least 1,250 hours over the preceding 12 months to be eligible for Parental Leave, Serious Illness in the Family and Family Medical Leave.

# Application Process

The application process for a leave of absence involves several steps:

- 1. Before you initiate a claim, [raise a ticket via myHR](#):** to speak to with a member of the Benefits team to ensure your leave is managed successfully. When you raise the ticket, be sure to include "LOA Office Hours" in the section labeled. Please provide a short description. Once your ticket has been received, a member of the benefits team will schedule time to speak with you.
- 2. Notify your manager:** You should inform your manager as soon as possible about your need for a leave. You are not required to disclose any personal health information.
- 3. Report your leave:** Report your leave to Lincoln Financial by visiting [MyLincolnPortal.com](#) (first-time users must register using company code: PEARSON) or by calling toll-free at 1-800-213-7327. Initiate your claim thirty (30) days prior to your anticipated leave or as soon as possible if advance notice is not possible. You will be assigned to a Lincoln Case Manager who will determine eligibility, Family Medical Leave (FML) determination, and paid leave entitlements (including Disability, Parental Leave, and State Benefits).
- 4. Provide documentation:** Provide (or have your physician provide) the necessary documentation, including the [Claim Intake Authorization Form](#), if you are initiating a disability claim. Print this document, sign and date the Authorization to Release Information section, and leave with your physician at your next visit. Lincoln Financial requires your physician to provide information about your medical condition. If this information cannot be obtained by Lincoln Financial, benefits may be delayed.

**Have the following information available when you report your claim:**

- Your physician's name, address, fax, and telephone numbers
- Your manager's name, telephone number, and email address
- Reason you will be out of work
- Your last day worked, first day absent from work, and your anticipated return-to-work date

Once you report your leave to Lincoln Financial, your status will be changed to suspend in Pearson's HR System, Fusion, and your Pearson pay will cease.

- 5. Approval or denial:** Lincoln Financial will review the request and documentation to approve or deny your leave. When your claim has been approved, Lincoln Financial will provide your leave of absence pay on a weekly basis, beginning with your approved initial date of disability. If your leave request is denied or you decided not to take the leave, you must [raise a ticket via myHR](#) to advise that you have returned to work. If you do not raise a ticket, your Pearson pay will be delayed. You will receive a series of communications via email about the status of your claim or you can check the status of your claim online at [MyLincolnPortal.com](#). Please note there can be instances where your FMLA is denied but STD is approved.
- 6. If Your claim is denied:** If a request for an STD is denied due to lack of medical evidence, you will be notified of such denial via email. You have 90 days to either file a formal appeal in writing to Lincoln Financial or submit new medical evidence for review. If you do not comply as required above, you are deemed to have voluntarily resigned employment. During the appeal process, you will not receive any disability payment or regular pay.

If you decide to return to work after the denial of your claim, you must [create a ticket via myHelp](#) to report your Return-to-Work date (RTW) on the day you return to work. This ensures your Fusion status is updated and re-establishes your regular pay. **Failure to do so will result in a delay in your regular pay.**

- 7. Ongoing communication:** You are required to keep in contact with your manager throughout your leave of absence. You must notify your manager and Lincoln Financial case manager of any changes to your leave and expected return-to-work date. You are not required to disclose any personal health information to your manager.

**Please note:** The use of paid time off (PTO) does not extend disability, FMLA, or any company-provided leave. You must be in an actively-at-work status to utilize your PTO benefits.

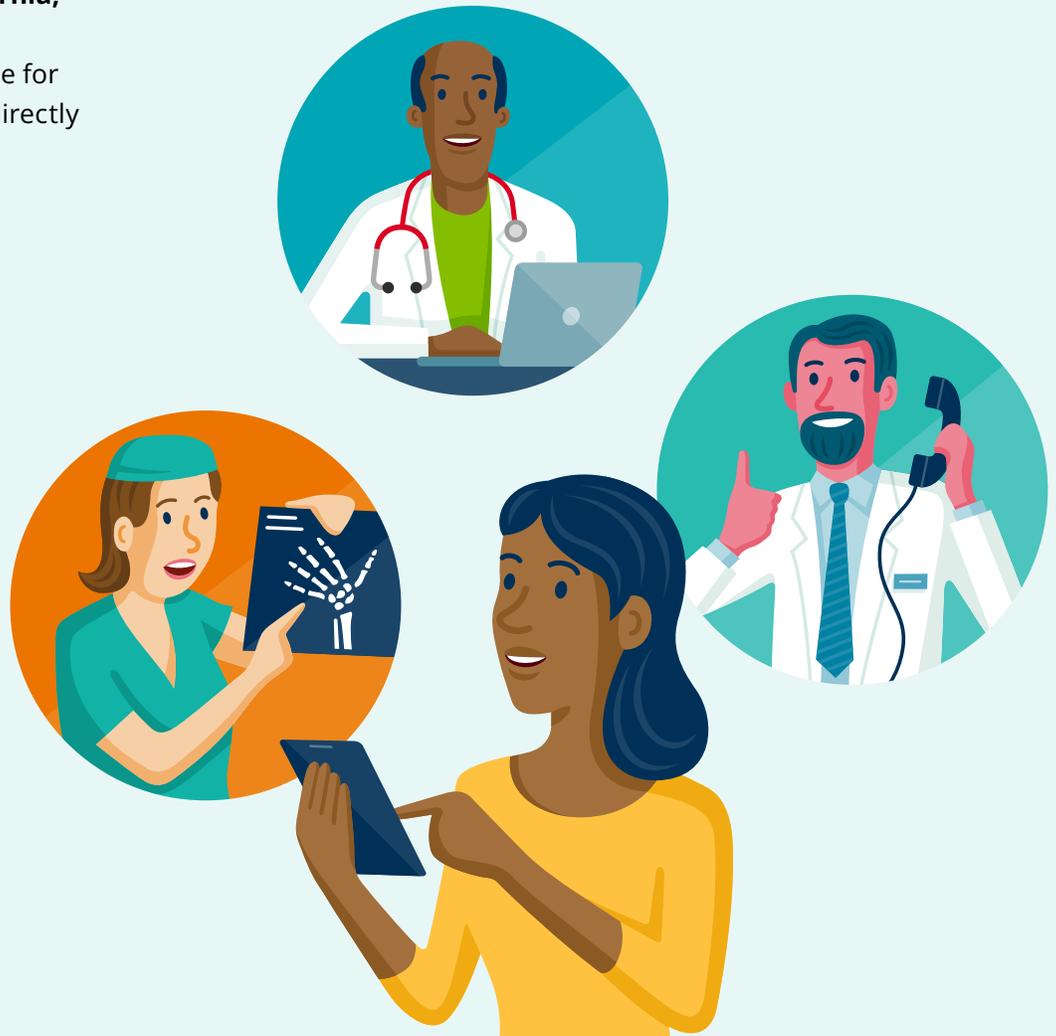
# Coordination with State-Provided Benefits and Other Leave Policies

Employees working in states (CO, CT, OR, NJ, NY, PR, RI, MA, or HI) with Temporary Disability Insurance and Paid Parental/Family Leaves are responsible for applying for those benefits, except as noted below:

- Employees working in the state of **Hawaii** will be eligible to receive disability payment under the provisions of this policy and do not need to file with the state;
- Employees working in **Connecticut, Oregon, New York, New Jersey, and Massachusetts** will receive their state benefit directly from Lincoln Financial and do not need to apply for state benefits;
- Employees working in **California, Colorado, Puerto Rico, and Rhode Island** are responsible for applying for those benefits directly through their state agency.

STD, Parental Leave, and Serious Illness in the Family Leave provided through Lincoln Financial will be reduced to coordinate with state disability and state parental/family leave benefits to provide a total combined benefit not to exceed the benefits provided by Pearson whether you have applied for such state benefits or not.

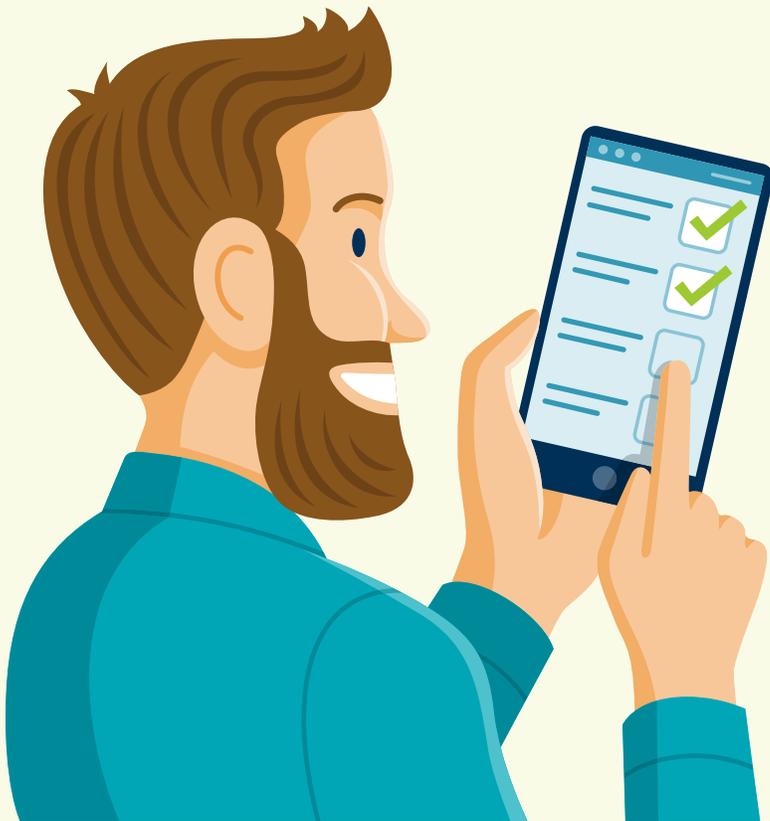
In addition to state benefits, other sources of income (such as—but not limited to—social security, no-fault insurance, railroad pension, veteran’s administration, or any third-party benefits) will be deducted from your disability payment if you are collecting payment for the same condition under which you qualify for STD.



## Returning to Work

Returning to work after a leave of absence involves several key steps:

1. **Obtain consent** (medical release) from the treating physician prior to returning to work.
2. **Contact your manager and Lincoln Financial** in advance of your Return-to-Work (RTW) date in order to coordinate the return. The first day you return to work, advise Lincoln Financial so that your claim can be closed and to protect any FMLA coverage, if applicable.
3. **Create a ticket via myHelp** to report your RTW date on the day you return to work. This ensures your Fusion status is updated and re-establishes your regular pay. **Failure to do so will result in a delay in your regular pay.**
4. **If you are released to return to work** with temporary restrictions or on a part-time basis, Lincoln will coordinate with your manager to determine if restrictions can be accommodated. If restrictions cannot be accommodated, you will be placed back on STD, full-time. If you return to work on a part-time basis, your status in Fusion will remain suspended. However, you will be required to report your working hours using the [Leave of Absence Pay Request form](#). Please note that part-time return-to-work arrangements must be approved in advance by Lincoln Financial.



## Benefits

During your leave you will be billed by Aptia365 for the same benefits as when you were actively working—tax advantaged accounts (HSA, FSA, Commuter, Parking), Employee Stock Purchase Plan and 401(k) deductions cease during your leave of absence and will resume once you have returned to work. If you have a 401(k) loan, Empower will send you information about how to continue your loan payments. During your leave, you will have access to the funds in your HSA, however, you will not have access to FSA and Commuter/Parking accounts until you return to work, according to federal regulations.

If you are on leave due to the birth or adoption of a child, please log into [Aptia365](#) to add your child to your medical coverage within 31 days of the child's arrival. If the child is not added within the 31-day period, the child will not be covered under Pearson's medical plan, and you will have to wait until the next annual enrollment period to add the child to coverage.

## If You Qualify for Long-Term Disability

The Long-Term Disability (LTD) Plan is designed to provide financial protection if you are unable to work as a result of an illness or injury—suffered on or off the job—for an extended period. You may receive LTD benefits if you have been disabled for more than 180 days and if your disability began after you became covered under the plan. To be eligible for LTD benefits, you must be continuously disabled during the 180-day elimination period and under the regular care of a physician. Lincoln Financial will initiate and manage your transition from STD to LTD. You may be required to gather additional information from your physician.



### Waiver of Premium for life insurance while on LTD

If you are approved for LTD while you are covered by supplemental life insurance and before you are 60 years old, you will contribute toward the cost of coverage during the first year of long-term disability. Lincoln Financial will manage your application for a waiver of premium. The life insurance company (Lincoln Financial) may require you to have a physical exam by a doctor of its choice. If Lincoln Financial approves a waiver of premium, it will be effective as of the date of such approval.

### Benefits while on LTD

During your leave you continue to be billed by Aptia365 for the same benefits as when you were actively working—tax advantaged accounts (HSA, FSA, Commuter, Parking), Employee Stock Purchase Plan and 401(k) deductions cease during your leave of absence and will resume once you return to work. If you have a 401(k) loan, Empower will send you information about how to continue your loan payments.

During your leave, you will have access to the funds in your HSA, however, you will not have access to FSA and Commuter/Parking accounts until you return to work, according to federal regulations.

### Returning to Work from LTD

Returning to work after a leave of absence involves several key steps:

1. **Obtain consent** (medical release) from the treating physician prior to returning to work.
2. **Contact your manager and Lincoln Financial** in advance of your Return-to-Work date (RTW) date in order to coordinate the return. The first day you return to work, advise Lincoln Financial so that your claim can be closed and to protect any FMLA coverage, if applicable.
3. **Create a ticket via myHelp** to report your RTW date on the day you return to work. This ensures your Fusion status is updated and re-establishes your regular pay. **Failure to do so will result in a delay in your regular pay.**
4. **If you are released to return to work** with temporary restrictions or on a part-time basis, Lincoln will coordinate with your manager to determine if restrictions can be accommodated. If restrictions cannot be accommodated, you will be placed back on LTD, full-time. If you return to work on a part-time basis, your status in Fusion will remain suspended. However, you will be required to report your working hours using the [Leave of Absence Pay Request form](#). Please note that part-time return-to-work arrangements must be approved in advance by Lincoln Financial.

### End of Year Tax Reporting

If you receive benefit payments from Lincoln Financial for STD, Parental Leave, SIL or certain state benefits for any part of the year, you will receive two separate W-2 statements. You will receive one from Pearson and another from Lincoln Financial. Both are required to ensure that you are reporting your earnings and taxes correctly.

# Pearson Resources

Pearson provides resources to assist you while you are on a leave of absence. [Unmind and the Employee Assistance Program](#) are available should you or your family member(s) need emotional support during this time. In addition, Pearson offers a number of [family care resources](#) that are applicable if you are adding a child to your family or caring for others. And lastly, [family care specialists](#) through Care.com can assist you in everything from family to finances, house & home to wellness, and more!

## Terms and Definitions

### **Claim:**

in Lincoln Financial terminology, "Claim" can refer to STD, Parental Leave or Serious Illness in the Family Leave.

### **Claim Intake Authorization Form:**

the document that gives Lincoln Financial permission to your medical records to process your disability claim. Lincoln Financial requires your physician to provide information about your medical condition. If this information cannot be obtained by Lincoln Financial, benefits may be delayed.

### **Employment Status:**

is the classification based on your assignment with Pearson.

### **FSA (Flexible Spending Account):**

is a savings account that lets you put aside pretax money to pay for eligible expenses. Unlike the HSA, if you don't use the money at the end of the year, you forfeit those funds. FSA funds are not available for use while on a leave of absence.

### **HSA (Health Savings Account):**

is a tax-free savings account you can use to pay for eligible health expenses anytime, even in retirement. You can build up savings to pay for future health care expenses. You can even invest your money once it reaches a minimum balance, which gives you the potential for tax-free earnings growth. The funds in your HSA are yours to keep, even if you leave Pearson or retire.

### **Intermittent Leave of Absence:**

refers to FMLA; allows an employee to take time off from work in smaller, separate blocks of time rather than a continuous period of time.

### **Leave:**

in Lincoln Financial terminology, "Leave" refers to all leaves of absence processed under FMLA. Please note there can be instances where your FMLA is denied but STD is approved.

### **Leave of Absence:**

a generic term used to refer to all types of leaves of absence offered by Pearson.

### **Long-term Disability (LTD):**

provides continuing income (equal to a portion of your pay) should you remain disabled and unable to work after you have exhausted your benefits under the Company's short-term disability policy.

### **Short-term Disability (STD):**

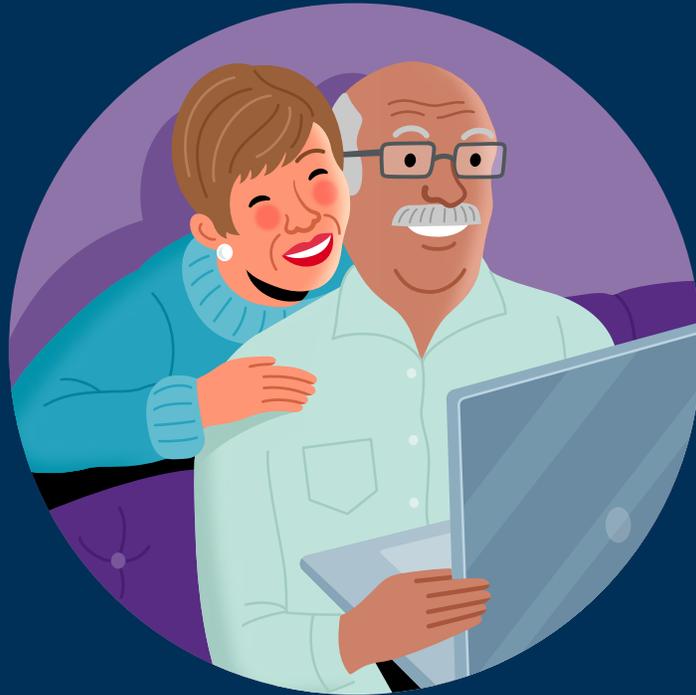
provides a cash benefit equal to all or part of your pay if you are unable to work as a result of a non-work-related illness or injury (including pregnancy and childbirth), if you are unable to work more than 80% of the regularly scheduled hours of your material and substantial duties of your regular occupation as determined by Lincoln Financial.

### **State-Provided Paid Benefits:**

certain states provide disability or paid family/parental leave. Benefit payments will be reduced to coordinate with state benefits to provide a total combined benefit not to exceed the benefits provided through Lincoln Financial whether the employee has applied for such state benefits or not.

### **Worker's Compensation:**

provides benefits to employees who become ill or injured because of their work. Employees involved in a work-related accident or illness should report it to their manager. If a work-related injury requires a leave resulting in receipt of worker's compensation benefits, that leave shall be considered FMLA leave under Federal Law. Employees must report all time missed from work due to a worker's compensation claim to Lincoln Financial as FMLA.



## Questions

If you have questions about your leave of absence claim, you should contact Lincoln Financial at 1-800-213-7327. You can also [create a ticket with your concern through myHR](#) and a member of the Benefits team will schedule a meeting with you to ensure you have the support you need before, during, and after your leave of absence.