

Large Employer Response to Coronavirus (COVID-19) – Part II

Quick Survey Results
March 2020

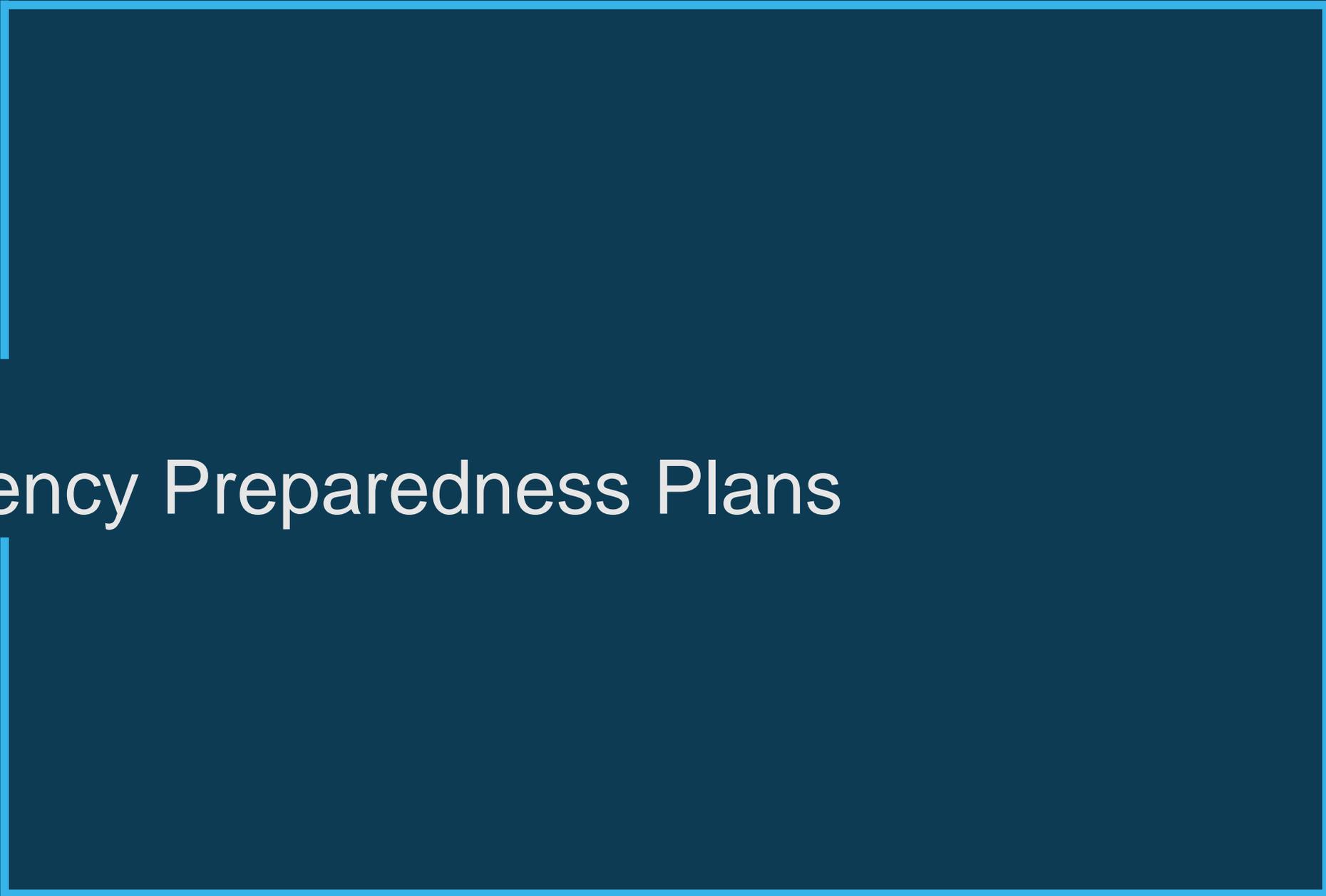


Overview

Ninety-five large employer members of Business Group on Health responded to this survey, conducted between March 9 and March 13, 2020. The purpose of this survey was to determine how large employers are supporting their employees as the novel coronavirus (COVID-19) continues to spread.

KEY TAKEAWAYS:

- Those surveyed have **quickly** planned for the pandemic: 7 in 10 employers have a firm plan in place; another 27% were crafting a pandemic plan when surveyed.
 - Employers have implemented policies to ensure **that** employees are still being paid during the coronavirus outbreak. Most employers have indicated that they offer pay continuation to employees under quarantine.
 - Coronavirus has impacted employer operations in and outside of quarantine areas, with more than **9** out of **10** employers implementing some type of travel restrictions. Additionally, most employers have expanded the use of telework where feasible.
 - Large employers have implemented a number of other strategies for employees and operations as well, including: converting in-person meetings/events to virtual, sending communications to educate employees and encouraging use of telemedicine.
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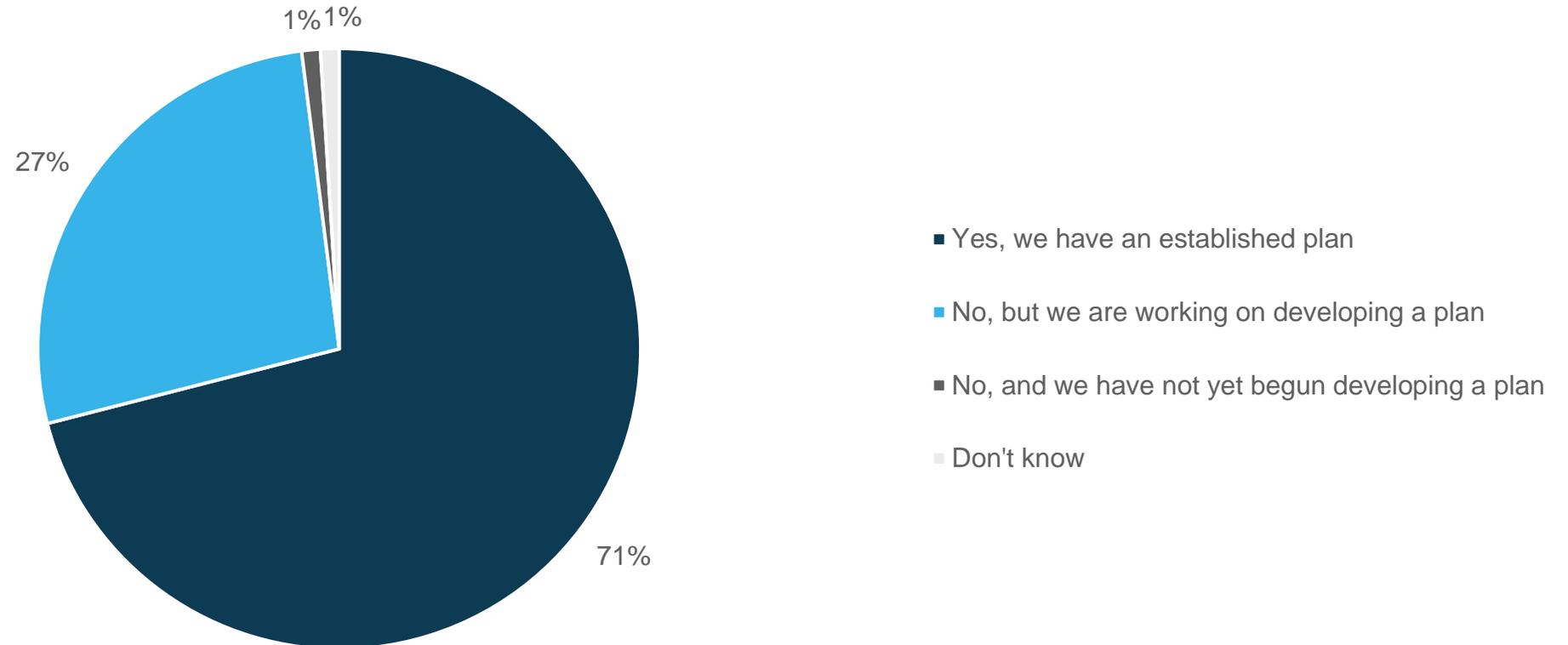


Emergency Preparedness Plans

Emergency Preparedness Plans Among Large Employers

7 in 10 large employers have an established emergency preparedness plan to guide supportive measures for employees during the coronavirus outbreak.

N=95

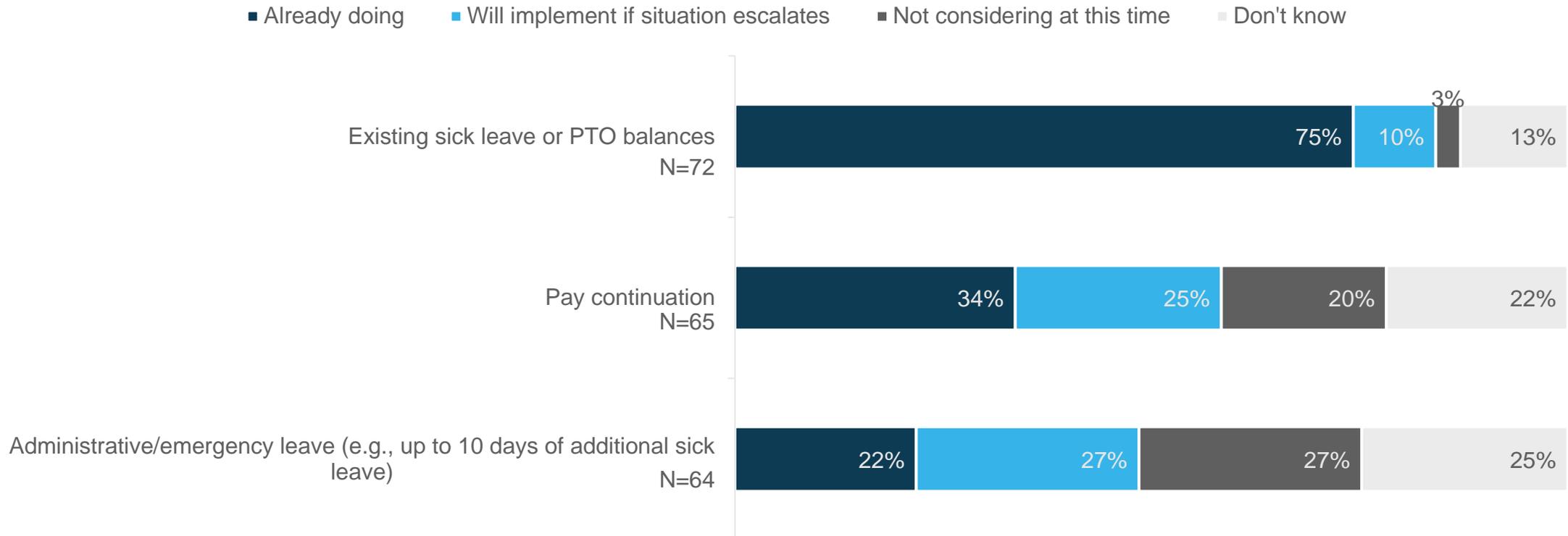


Q: Does your company have an emergency preparedness plan in place to support employees during the continued spread of coronavirus?

Leave and Pay Policies

Pay Continuation Strategies for Employees Exposed to Coronavirus or who are Exhibiting Cold/flu Symptoms and Can't Work from Home

One-third of large employers are currently offering pay continuation to employees that have been exposed to coronavirus or who are exhibiting cold/flu symptoms and can't work from home.

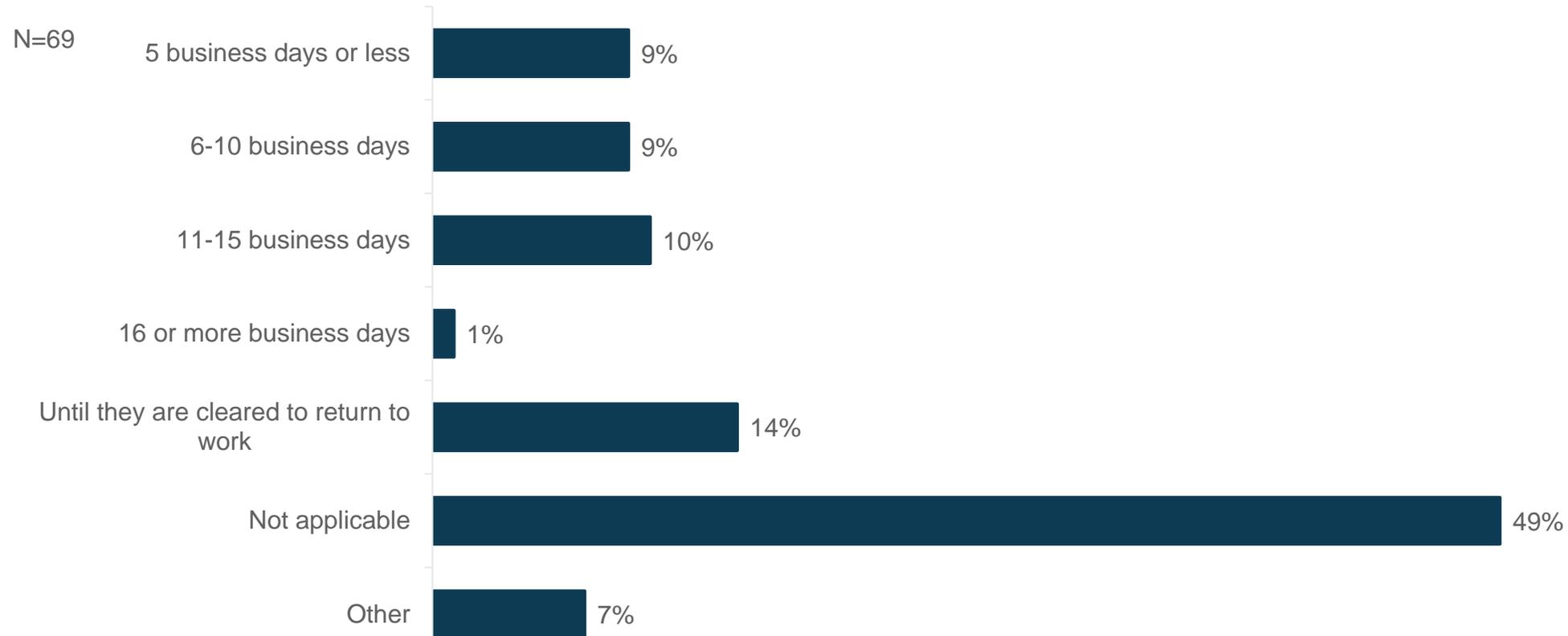


Note: Some employers also indicated that they are making STD available for employees with no waiting period.

Q: For employees that have been exposed to coronavirus or who are exhibiting cold/flu symptoms, and can't work from home, what pay continuation strategies will be in place?

Duration of Emergency Leave or Pay Continuation for Employees with Cold/flu-like Symptoms

14% of large employers will offer emergency leave/pay continuation to employees with cold or flu-like symptoms (but who have not tested positive for coronavirus) until they are cleared to return to work.



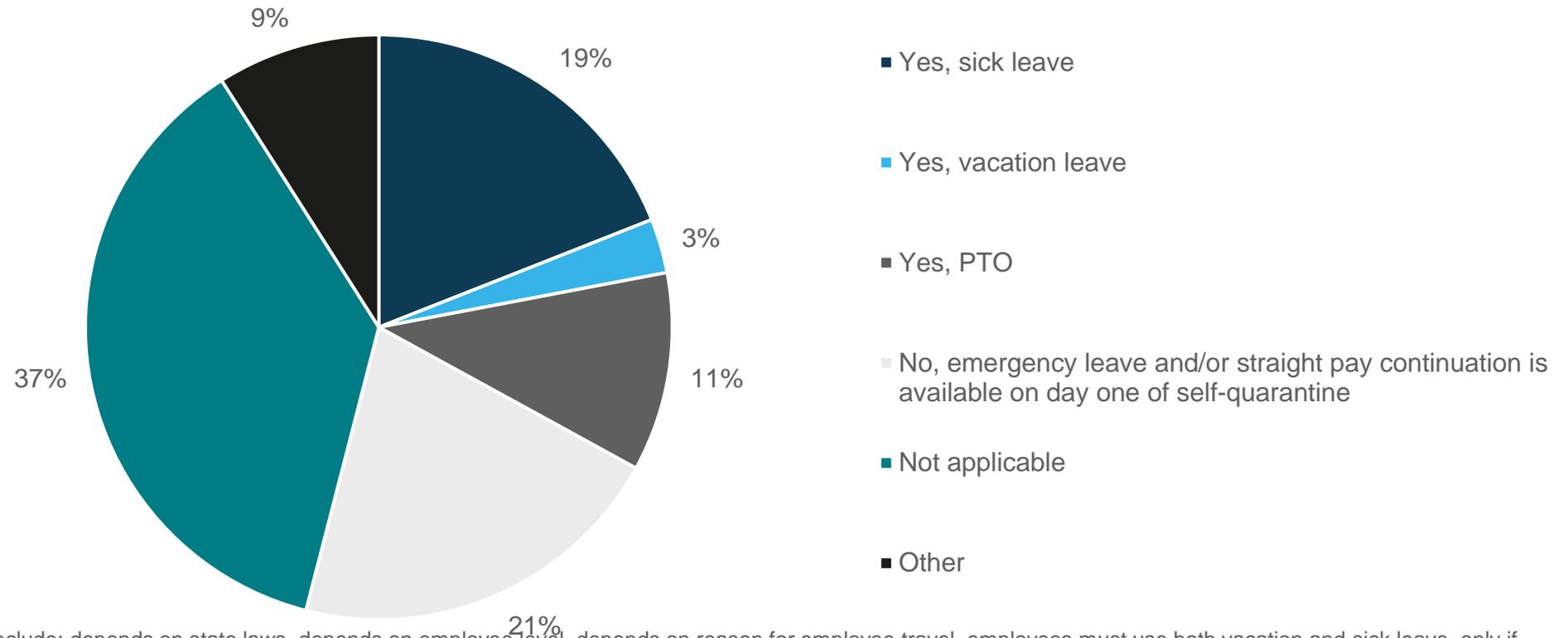
Note: Other responses include: depends on state laws, following company paid sick leave practices, reviewed on a case by case basis, if a case is caused by business travel, 10 days of special leave is provided otherwise employee may use PTO, however long it takes for employee to be fever free (without medication) for 24 hours.

Q: For employers offering emergency leave or straight pay continuation to employees with cold or flu-like symptoms (but who have not tested positive for coronavirus), what is the duration you are making available to employees?

Large Employers Strategy Regarding Emergency Leave and/or Pay Continuation

21% of large employers are making emergency leave and/or pay continuation available without having to exhaust other leave banks (e.g., sick, vacation, PTO) first.

N=70

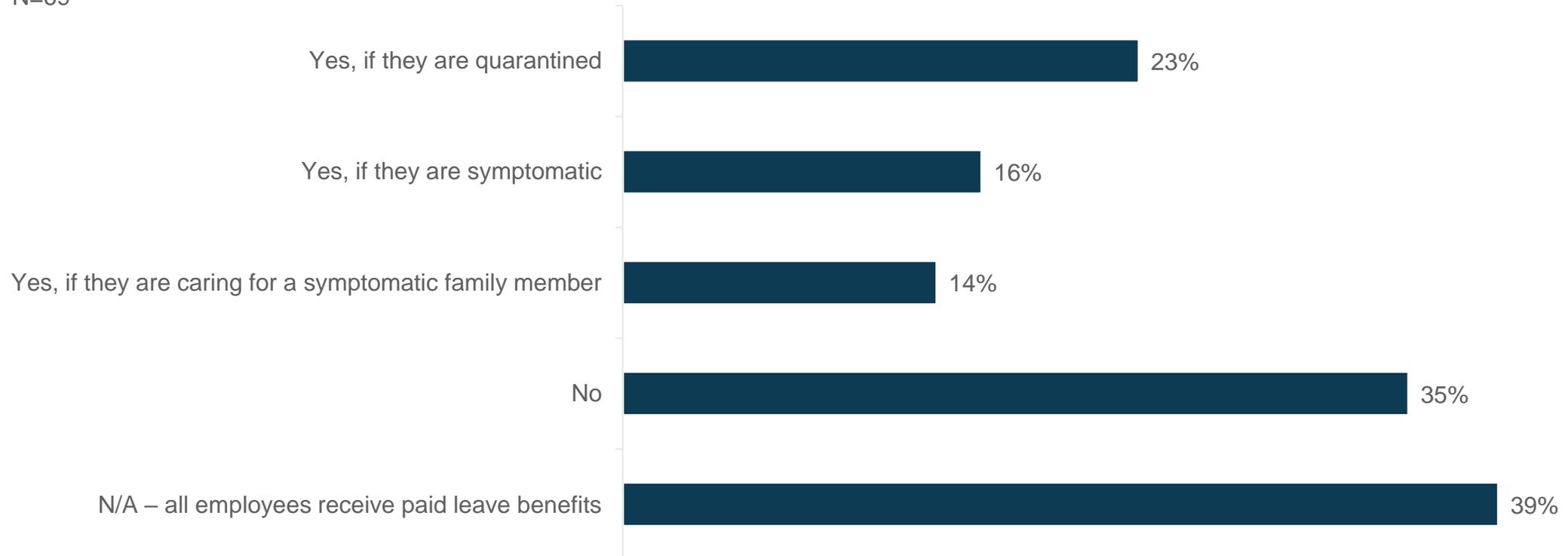


Note: Other responses include: depends on state laws, depends on employee level, depends on reason for employee travel, employees must use both vacation and sick leave, only if employee self-quarantined without a government mandate.
Q: For employers offering emergency leave or straight pay continuation to employees with cold or flu-like symptoms (but who have not tested positive for coronavirus), is your company requiring the employee to use accrued leave balances first?

Availability of Pay Continuation for Affected Employees That are not Typically Eligible for Paid Leave Benefits

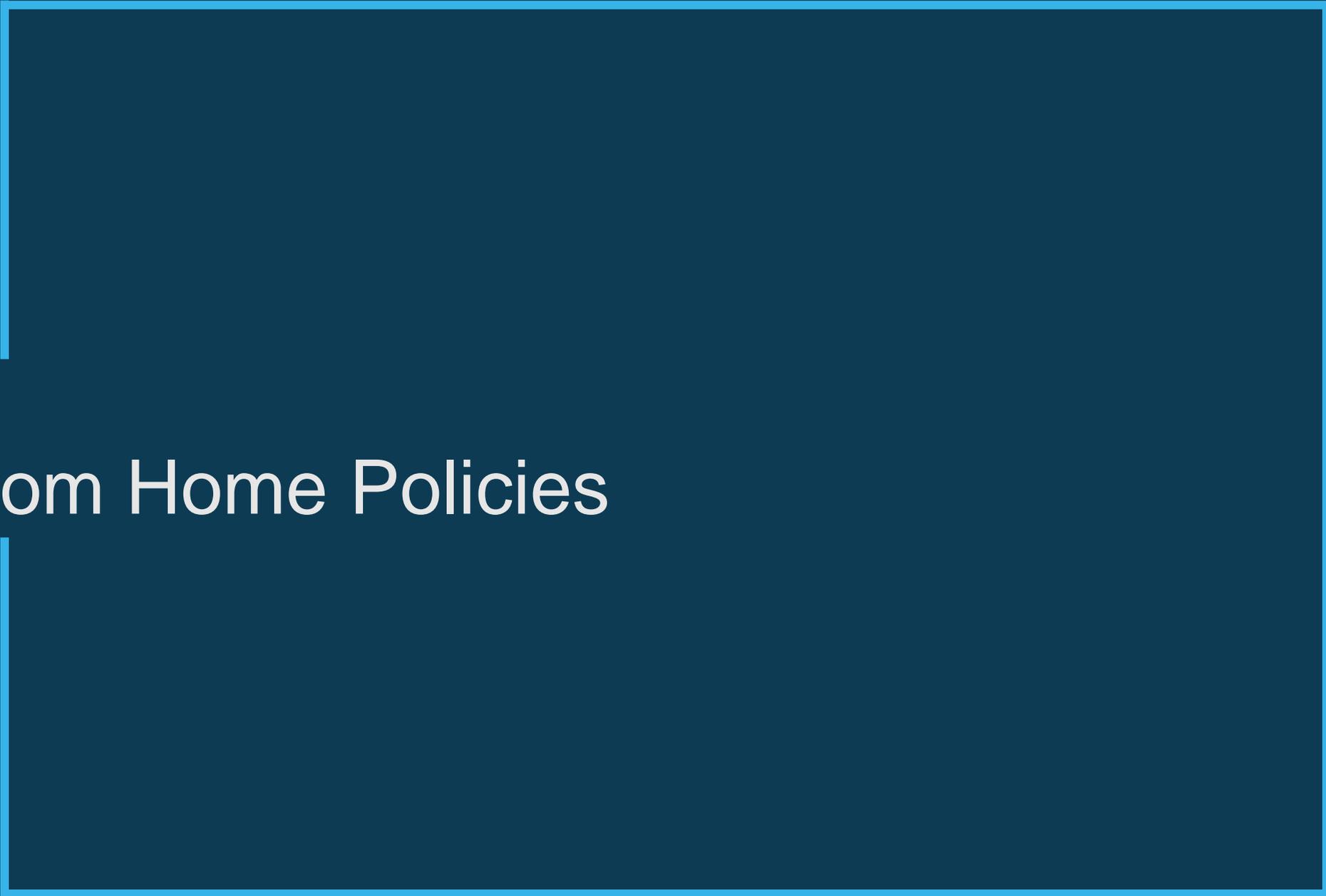
Large employers are supporting employees with pay continuation in certain circumstances, if they are not currently eligible for paid leave benefits.

N=69



Note: One employer is offering unlimited leave with full pay for employees that can't work from home.

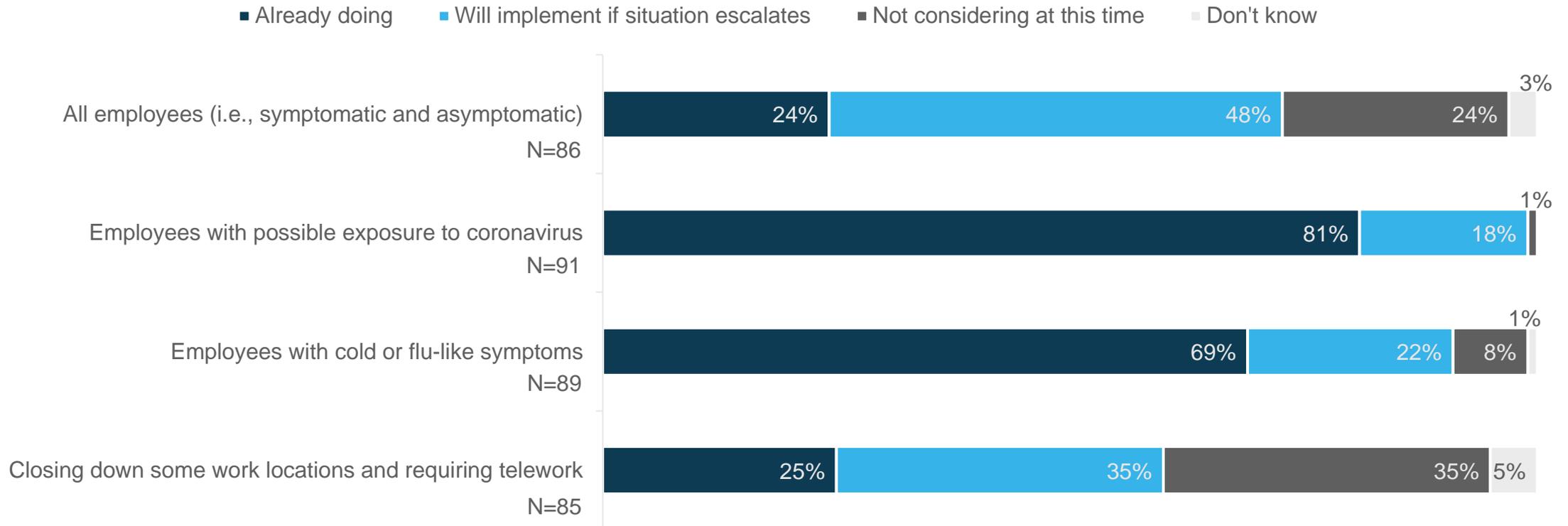
Q: For employees who are not typically eligible for paid leave benefits (e.g., part-time or hourly employees), is your company offering pay continuation of a form of paid leave if they are affected by COVID-19?



Work from Home Policies

Impact of Coronavirus on Work from Home Policies

Nearly all surveyed employers have already implemented work from home policies for at least some groups of employees. 1 in 5 are currently requiring employees with possible exposure to coronavirus to telework.

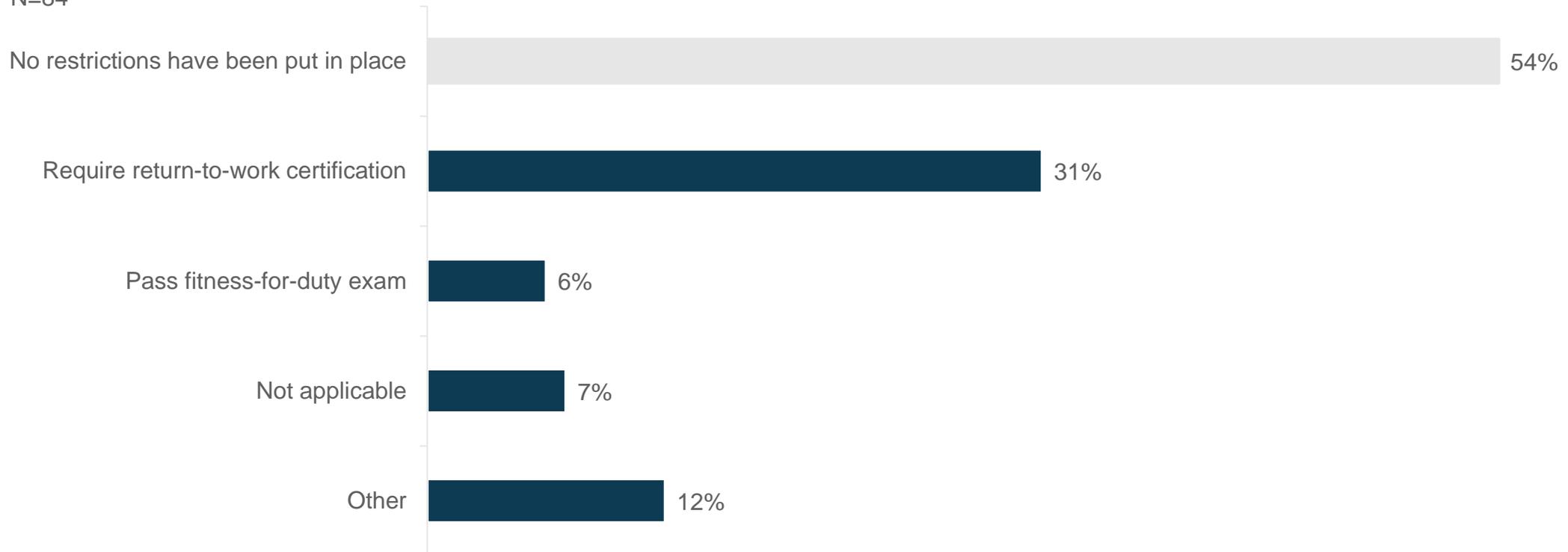


Q: Has (or will) your company enacted any work from home policies for the following groups of employees?

Returning to Work After a Mandatory Self-quarantine/Work from Home Period

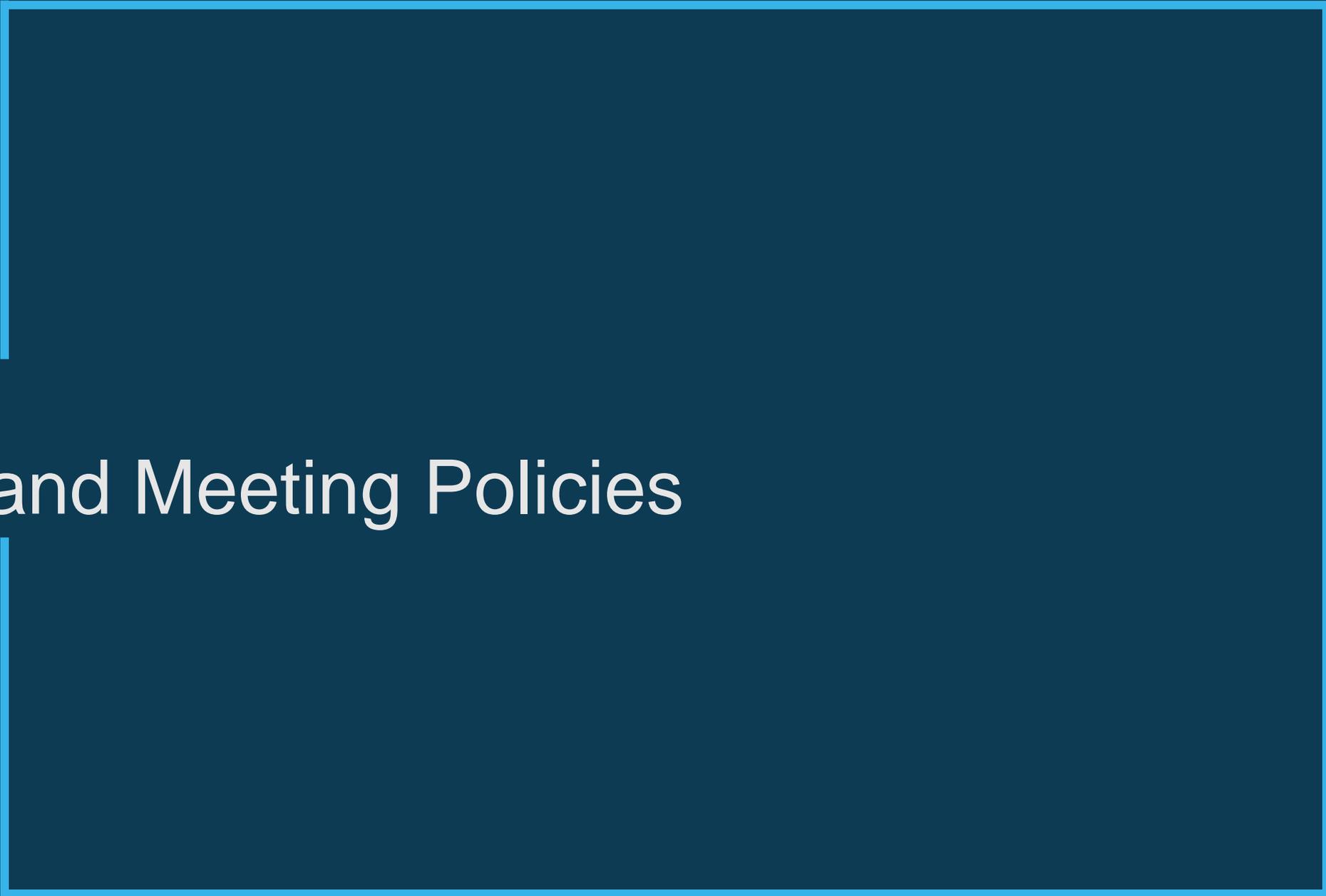
More than half of large employers currently have no restrictions in place for employees that are returning to work after a mandatory self-quarantine or work from home period.

N=84



Note: Other responses include: following guidance from company's medical services provider, medical release from employee's treating medical provider, employee must stay home for 24 hours after symptoms are no longer present, buildings are doing temperature checks on anyone entering the building, employee can return if they are symptom free after 14 days, employee must report to health services prior to starting work, return pending manager approval, doctor's note is required.

Q: For employees returning to the office after a mandatory self-quarantine/work from home period, what return to work processes apply?

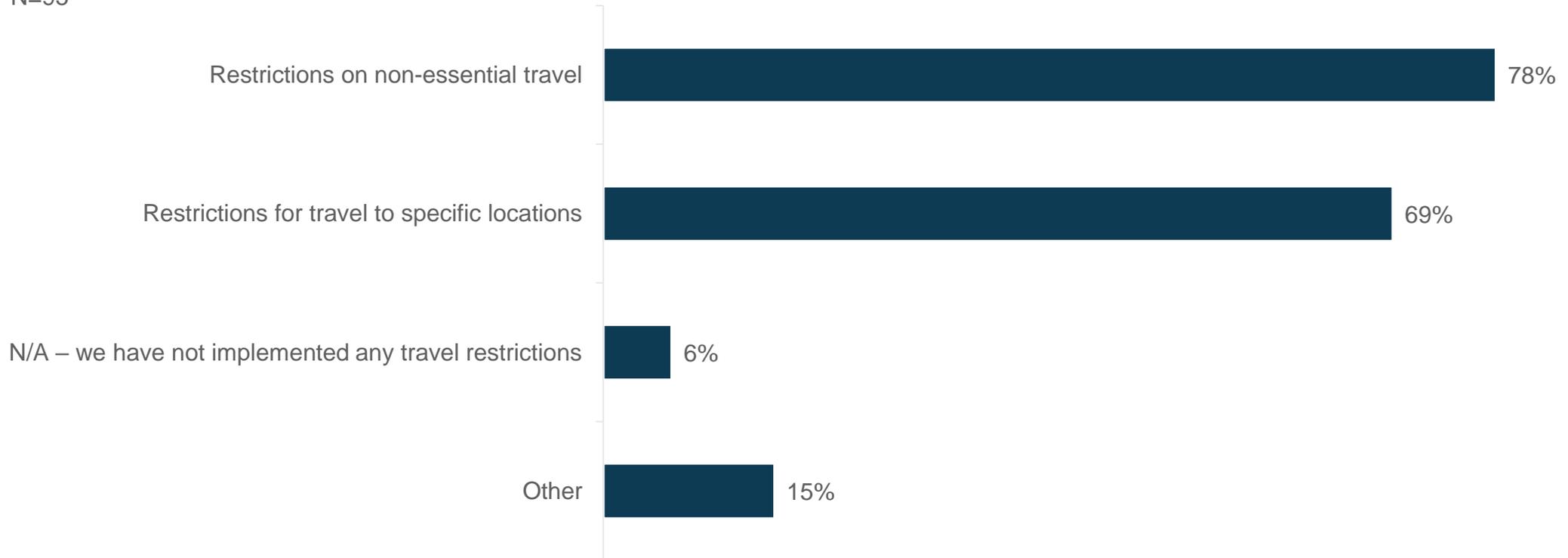


Travel and Meeting Policies

Impact of Coronavirus on Company Travel Policies

78% of large employers have placed restrictions on non-essential company travel in response to the coronavirus.

N=95



Note: Other responses include: also advising against non-essential personal travel, all business travel has been suspended, restrictions have been placed on all travel, travel within an employee's own country is permitted but not outside of that country, follow CDC guidelines, senior level leadership approval required for all travel.

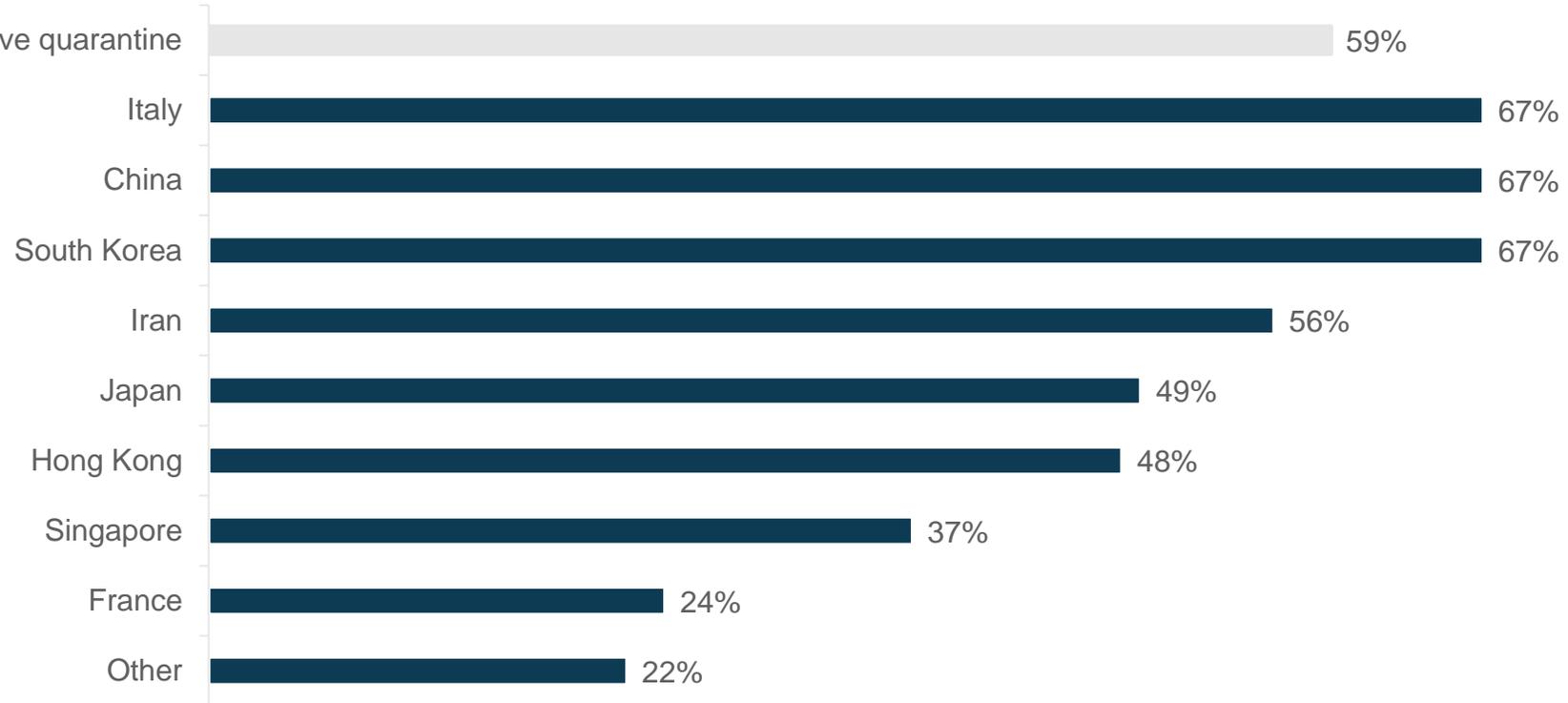
Q: Has your company implemented any travel restrictions in response to coronavirus?

Impact of Coronavirus on Company Travel to Specific Locations

59% of large employers have restricted travel to any country with an active quarantine.

N=63

Any country with an active quarantine



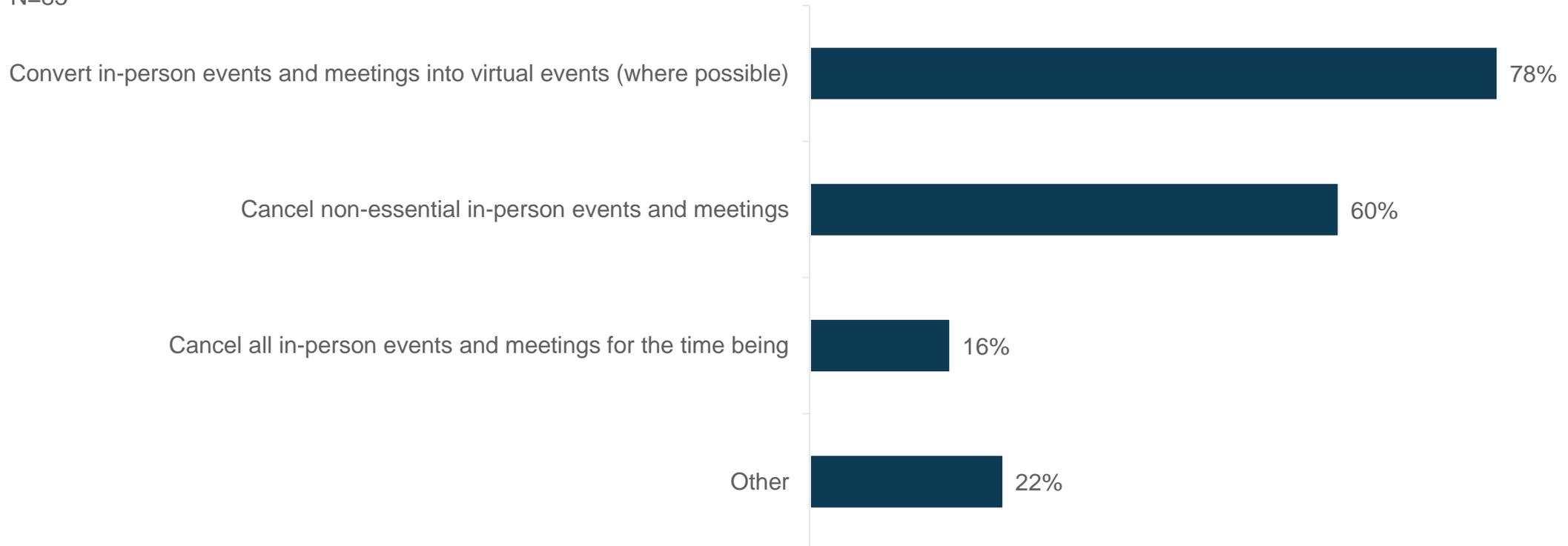
Note: Other responses include: Seattle, WA, Taiwan, Macau, any country that is not an employee's home country, India, Israel, any country outside of North America, any country that is considered international, no international or domestic travel, no travel to any country designated by the CDC as Tier 2 or 3.

Q: If your company has restricted travel to specific locations in response to coronavirus, what locations have been affected?

Impact of Coronavirus on Company Events and Meetings

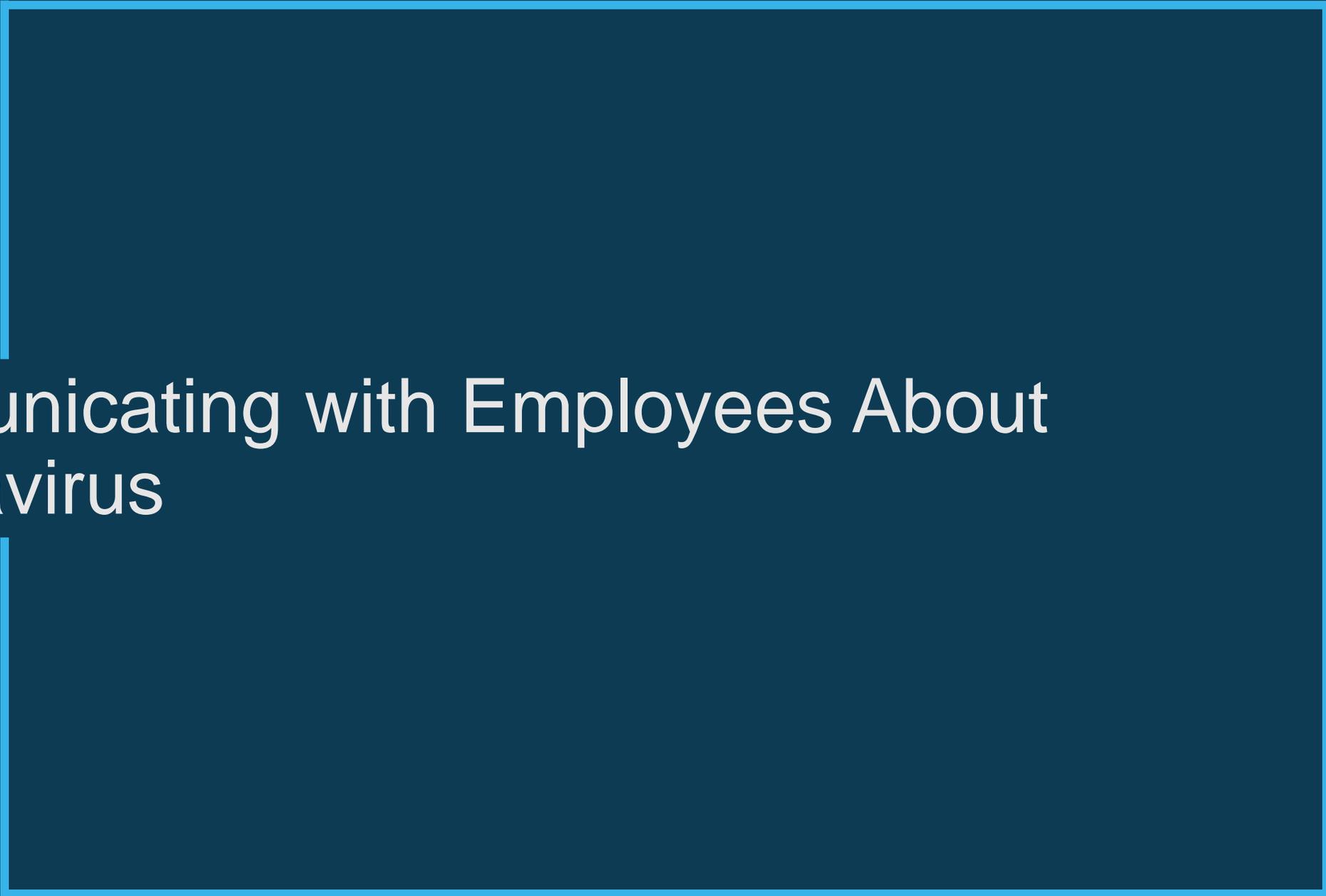
78% of large employers have converted in-person events and meetings into virtual events where possible to mitigate the spread of the virus.

N=83



Note: Other responses include: no visitors allowed in the office, no office visitors that have traveled to CDC restricted areas or who have COVID-19 or have been exposed to COVID-19, no in-person meetings larger than a specified number of participants (varies by company), every meeting requires prior approval, employees not permitted to attend meetings or conferences held by others, policies vary by local conditions, all vendor meetings cancelled.

Q: Has your company enacted any of the following policies around company hosted meetings and events?

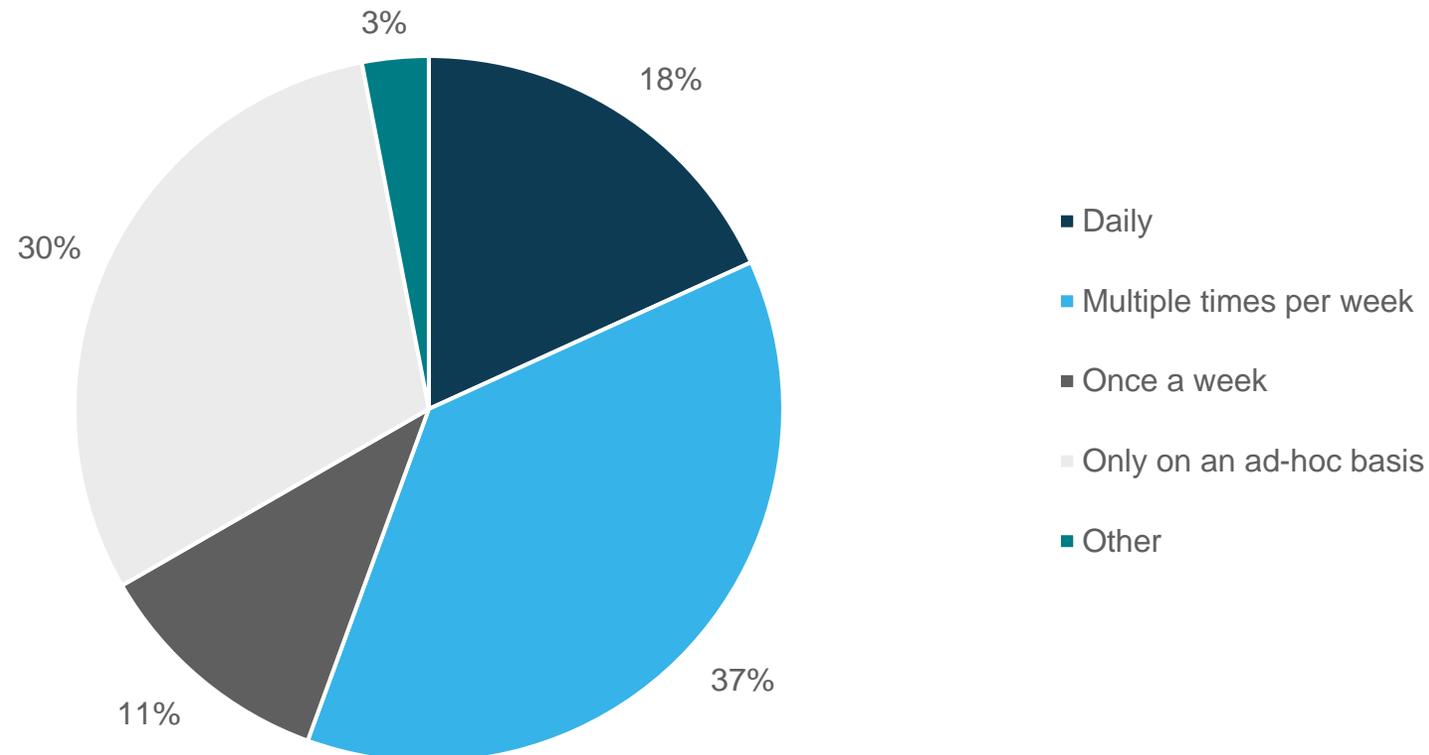


Communicating with Employees About Coronavirus

Large Employers are Staying in Contact with Employees About the Coronavirus

Two-thirds of large employers are communicating with employees about the coronavirus at least once a week.

N=87



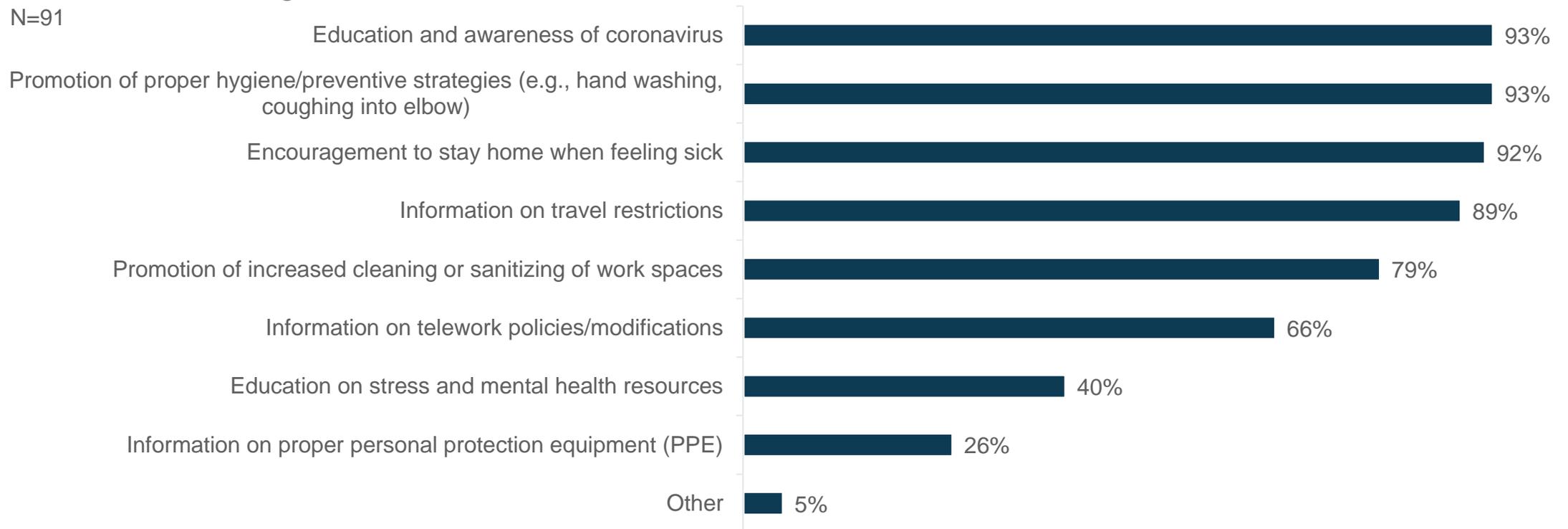
Note: Other responses include: company has implemented a microsite for employees to go to for real-time updates, communication frequency depends on location – China receives frequent communications while others are on an ad-hoc basis, communications are added to company intranet.

Q: On average, how frequently is your company communicating with employees about the coronavirus?

Large Employer Coronavirus Communication Messages

Large employer communications to employees regarding coronavirus most commonly include education on coronavirus, information on proper hygiene/illness prevention strategies and staying home when feeling sick.

N=91



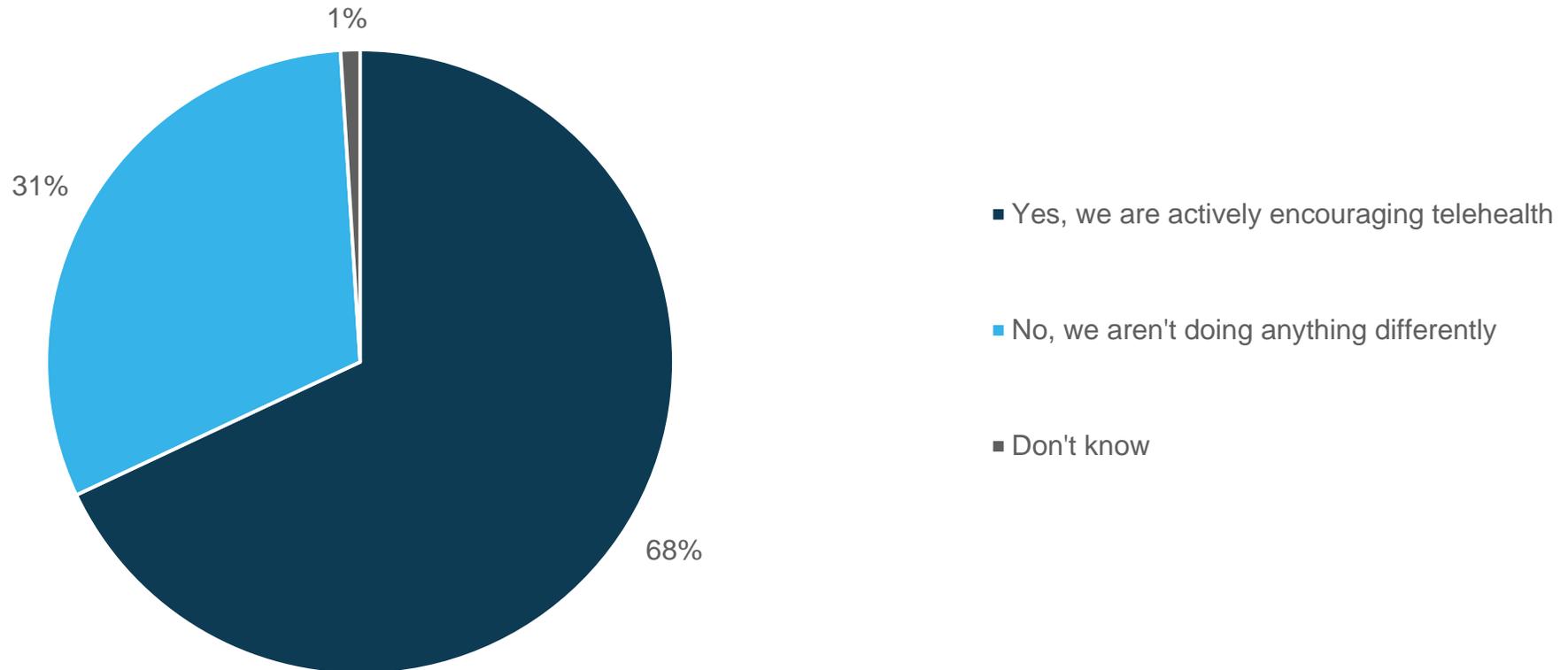
Note: Other responses include: any company policy updates as a result of the changing situation with the coronavirus. CDC and WHO resources, site visitor guidelines, promotion of video visits for health.

Q: Which of the following messages has your company included in coronavirus-related communications to employees?

Large Employers are Encouraging Greater Use of Telemedicine

Two thirds of large employers are encouraging employees to use telemedicine during the coronavirus outbreak.

N=91



Note: Employers reported increasing communications regarding telemedicine benefit through multiple channels, eliminating copays, and extending coverage to all employees, not just those enrolled in the health plan.

Q: Is your company doing anything to encourage greater use of telemedicine during the coronavirus outbreak?



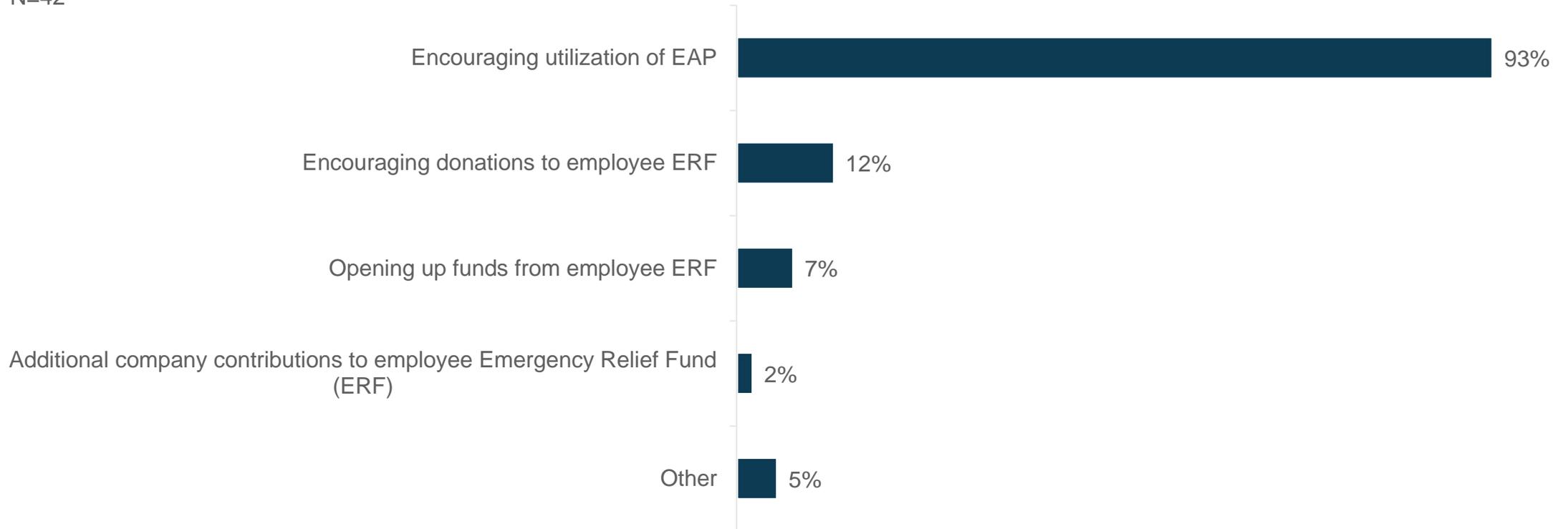
Other Benefits

Large Employer Emergency Response Actions to Coronavirus



93% of large employers are encouraging EAP utilization among employees in response to coronavirus.

N=42



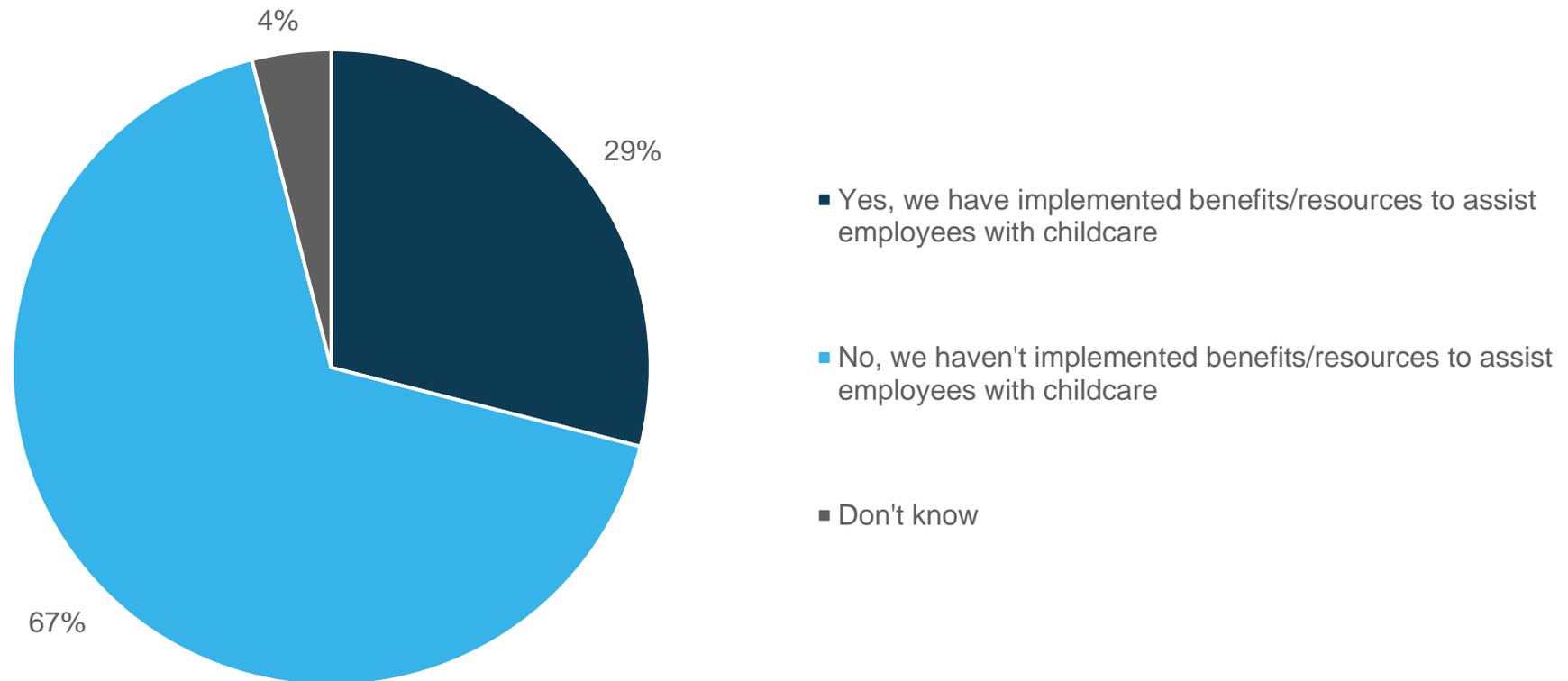
Note: Other responses include: encouraging donations to and utilization of vacation donation program, company will make additional contributions to ERF as needed.

Q:Has your company taken any of the following emergency response actions in response to coronavirus?

Large Employers Assisting Employees with Childcare Benefits and Flexibility

In the event of school closures due to coronavirus, 29% of large employers will implement benefits and resources to assist employees with childcare benefits and needed flexibility.

N=77



Note: Employers reported offering schedule flexibility in response to school closures and child back up care.

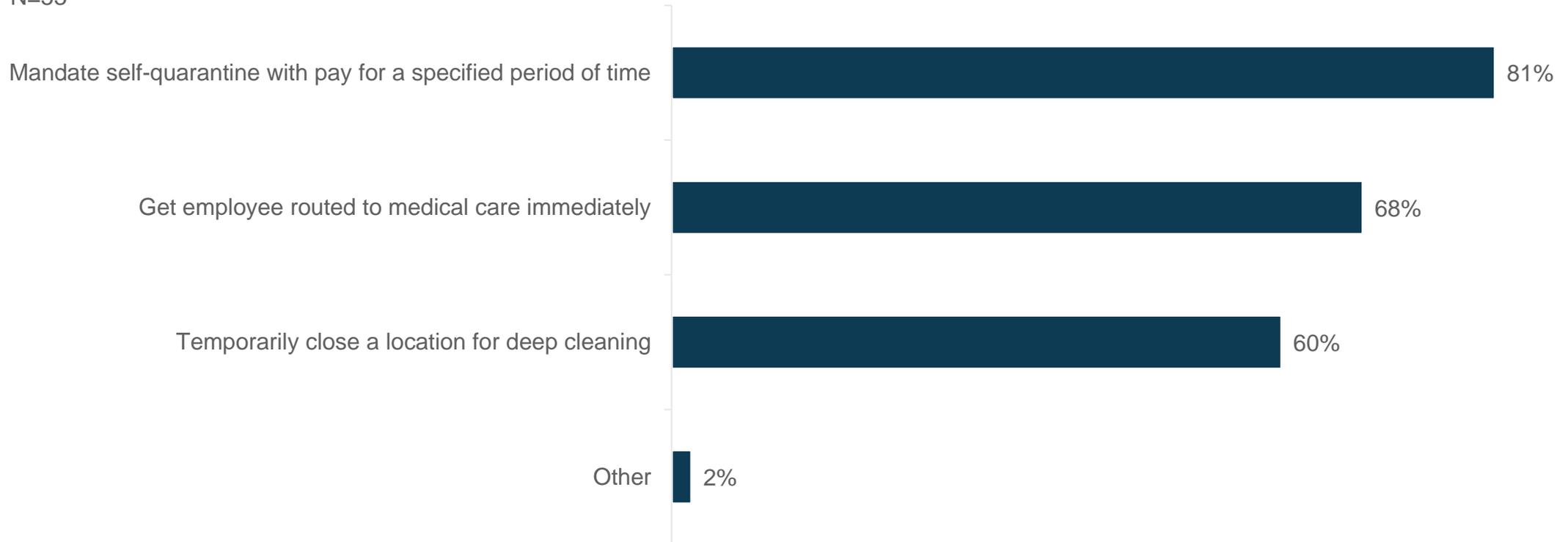
Q: Has your company implemented any benefits/resources to assist employees with childcare benefits and needed flexibility in the event of school closures due to coronavirus?

Large Employer Support of Employees Exposed While On the Job



81% of large employers will require employees who may have been exposed to the coronavirus while on the job to self-quarantine for a specified period of time.

N=53



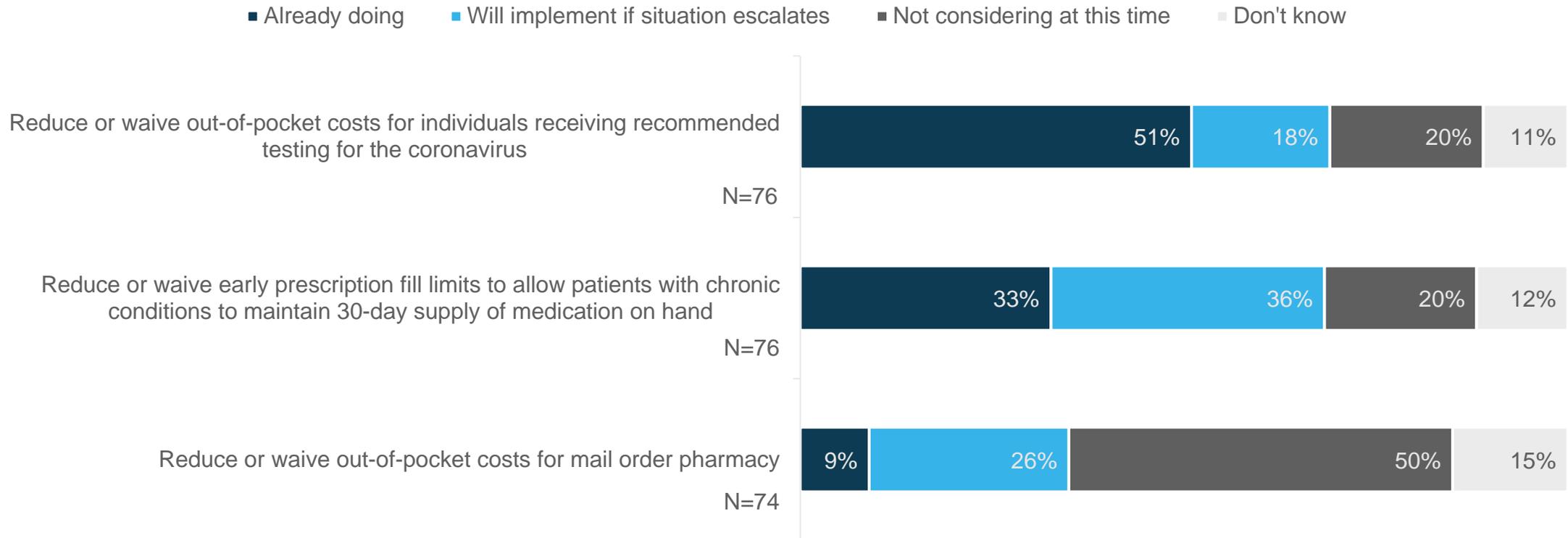
Note: Other responses include: allow employee to work from home.

Q:How is your company supporting employees who may have been exposed to coronavirus while on the job?

Large Employer Cooperation with Health Plan(s) and/or Pharmacy Benefit Manager(s) in the U.S.



More than half of large employers have reduced or waived out-of-pocket costs for individuals receiving recommended testing for the coronavirus.

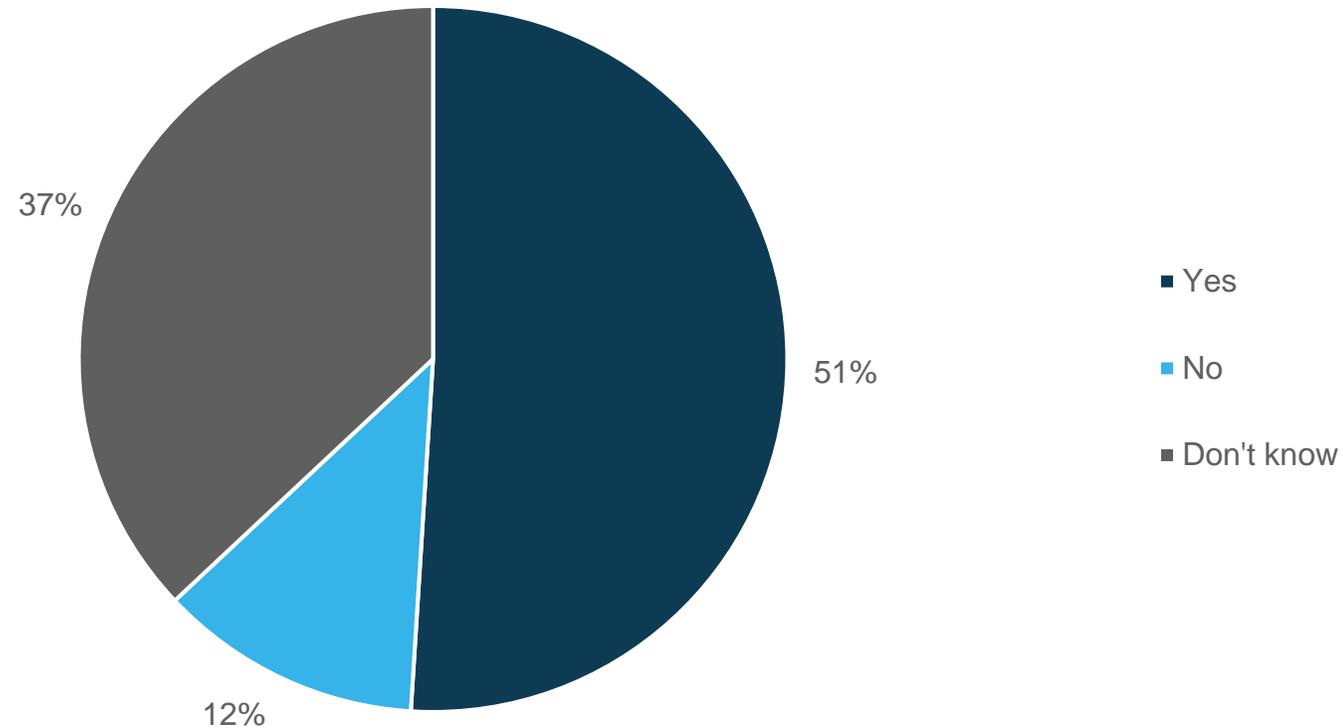


Note: Some employers indicated that they would waive copays for telemedicine and encourage prescription refills to plan for possibility of quarantine.
Q: Within the U.S., is your company working with its health plan(s) and/or pharmacy benefit manager(s) to increase access to any of the following?

Out-of-Pocket Waivers/Reductions for Coronavirus Testing for Employees with a CDHP in the U.S.

More than half of large employers are ensuring that eliminated or reduced out-of-pocket costs for coronavirus testing will apply to employees enrolled in a CDHP with an HSA.

N=67

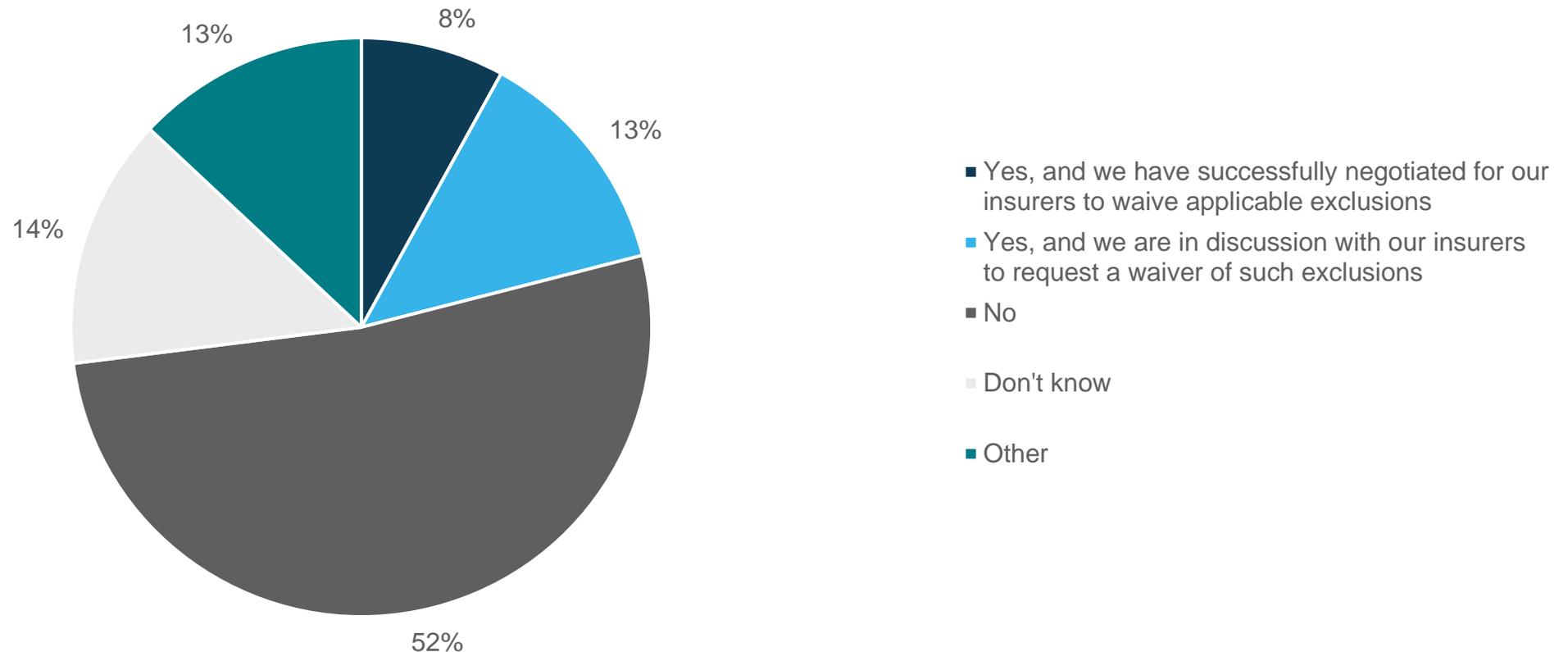


Q: Within the U.S., if your company will reduce or waive out-of-pocket costs for individuals receiving recommended testing for the coronavirus, will that reduction/waiver also apply to participants in a consumer-directed health plan with a health savings account?

Waiving Exclusions in Local Medical and Life Insurance Policies Related to Coronavirus Globally

8% of large employers have reviewed local medical and life insurance policies for any exclusions related to coronavirus.

N=71



Note: Other responses include: no exclusions are needed, currently under review.

Q: On a global scale, has your company reviewed local medical and life insurance policies for any exclusions related to coronavirus?

Thank you



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