



2025 Leave of Absence Checklist

Whether you're having a baby, attending to personal matters or need time off for other reasons, ensure a smooth transition before and after your leave by taking these important steps.

- Discuss your leave plans with your manager as far in advance as possible. In most cases, you should talk to your manager **30–45** days before you intend to start your leave. This helps your manager assess the business impact of your leave and ensure your work is covered in your absence. During your discussion, give your manager your expected leave start date and return-to-work date.
- Between **30–45** days prior to the start of your leave, submit your leave request by contacting Matrix at **877.202.0055** or www.matrixabsence.com. Don't forget to read your Leave of Absence packet that is sent to you. It contains important information and actions for you to complete.
- Complete your leave paperwork in a timely manner to ensure disability payments, if applicable, are processed as quickly as possible. Generally, you have **15** business days to provide the necessary documentation so that a determination may be made for your leave.
- Connect with the Benefits team prior to your leave to get aligned and your questions answered. If you have benefit payroll deductions, you need to make arrangements to pay for them prior to or during your absence. The Benefits team will connect with you directly regarding arrangements to pay any missed benefit payroll deductions.
- Remember to sign up for direct deposit with Matrix so there are no hassles with being paid during your leave. Matrix makes payments on Friday each week. However, it can take 1–2 business days for the deposit to reflect in your bank account.
- Enter sick time, if available, in ADP prior to your leave so you receive income during your seven-day waiting period prior to short-term disability beginning. If you need assistance at any point in the process, please contact payroll at askpayroll@sofi.org.
- If you reside in a state with a paid disability or family leave program, please remember to file with your state's program. Matrix will provide you additional information about your state's applicable paid leave programs. However, it is your responsibility to file and complete this task.
- On your last day of work, set up an out-of-office message on your email and voicemail and provide the name, email and phone number of the person who is covering for you.
- If appropriate, add your baby to your insurance plan within **30 days** of birth or adoption by logging into Workday Benefits. You may want to consider enrolling in Flexible Spending Accounts to use pre-tax dollars to reimburse yourself for qualified expenses. Remember to review your beneficiaries in Workday Benefits and update, if desired.
- Consider and update, if appropriate, your tax exemptions in ADP.
- Need support? Check out Maven, Modern Health, and the Parents at SoFi employee resource group for additional support and resources for new parents

Timeline



30-45 days prior to Going on Leave

1

- Notify your manager & Benefits Team of the expected leave dates
- If appropriate, enroll in the Healthy Pregnancy program with Cigna or Kaiser
- Check out Maven for additional FREE support & resources

30 Days Prior to Going on Leave

2

- Contact Matrix, SoFi leave administrator at **877.202.0055**
- Remember, all foreseeable leaves should be requested **30 days in advance** of the need for leave.

Matrix Provides Documentation

3

- A claims adjuster will review your eligibility & send you the necessary notices and documents
- Complete & submit the required paperwork timely

Entering Your Available Sick Time

4

- Enter your sick time, if available, in ADP prior to your leave. There is a 1 week waiting period before your short term disability begins.

30 Days from Date of Birth

5

- Enroll your newborn in coverage via Workday Benefits or by contacting the Benefits Team at benefits@sofi.org
- It's OK to enroll without the social security number.
- Be sure to apply for any applicable state disability or paid family leave programs.

1 Week Prior to Return to Work

6

- Please confirm with Matrix within 1 week of your expected return to work date.
- If you need to extend your leave, Matrix will provide you with the necessary paperwork

Your Return to Work: A Few Things to Keep in Mind

- Obtain clearance from your healthcare provider to return to work. Please provide the Return to Work note to Matrix or hrleaves@sofi.org 5 days in advance of your return to work date. For most leaves, you should contact your manager and Matrix one week before your scheduled return to confirm your return-to-work date. Note: System access cannot be restored if no return to work note is provided.
- Consider enrolling in the Return to Work or New Parent tracks with Maven. More information can be found at SoFi Central/ US Benefits/ Maven site.
- Check out resources for nursing mothers. Each office location provides for a private, dedicated space for mothers who are breastfeeding. In addition, you may want to check out the support from Maven, who can assist with lactation counseling and other needs.
- Join the [#circle-parentsatSofi](#) group on Slack to receive support from other parents at SoFi.



Questions? We are here to help.

SoFi Benefits Health Advocate

Email: hrleaves@SoFi.org or benefits@sofi.org

Phone: 866.989.2942

