Leave Planning Tool V1 - Product Requirements Document

Summary

The Leave Planning Tool V1 is a free, self-service solution that empowers employees to understand their potential leave benefits before formally requesting time off. By leveraging AbsenceSoft's compliance engine and AI-powered conversational interface, this tool provides personalized leave eligibility and entitlement projections based on federal, state, and select municipal regulations.

This tool will play a pivotal role in AbsenceSoft's strategic roadmap. It delivers critical feature parity with competing solutions already in market. Beyond core functionality, it will drive traffic to the AbsenceSoft marketing site and serve as a key demand signal for downstream markets, allowing us to gauge interest from smaller employers seeking modern, self-service tools. As the flagship product in our modernized, agentic-first solution, it lays the foundation for future intelligent and product-led growth experiences.

Competitive Landscape

The leave planning space is evolving rapidly with competitors like Aidora, Veer, PERKY, and Cocoon offering consumer-grade experiences. However, most tools:

- Focus on parental leave scenarios
- Don't address PWFA and ADA along with state and Federal Leave Laws
- Do not account for Employer-specific benefit plans on the free version

AS Competitive Advantage:

- *Compliance Depth:*
- *Agentic User Experience: Wayfinding?*
- Handling a wide array of leave use cases:

User Personas

Primary Users:

- **Employees planning major life events**
  - Expectant parents planning maternity/paternity leave
  - Employees facing medical procedures or family care needs
  - Workers uncertain about their leave rights
- **Secondary Stakeholders:**
  - **HR Teams** who benefit from reduced repetitive inquiries
  - **Employers** seeking to improve employee experience without legal liability

  - **People Managers** handling initial requests from employees and creating coverage plans

User Personas

"Planning Patricia"

- Pregnant employee at a mid-size company
- Wants to understand leave options 3-6 months before due date
- Confused by overlapping FMLA, state leave, and STD policies
- Wants visual timeline to coordinate with partner and plan finances
- Anxious about job security and benefits continuation

3. The Problem

Problem Statement: Navigating leave planning and accommodations is a complex, often confusing journey due to the intertwined nature of laws, policies, and personal circumstances. These challenges form barriers that make informed decision-making difficult for employee during critical life events.

- **The leave and entitlement landscape is highly complex and situational:** The interplay between federal, state, local, and employer policies creates a confusing patchwork of rules where eligibility, job protection, and pay differ based on factors like location, reason for leave, work history, and timing. Without support, employees and HR teams struggle to understand how policies interact, what time and pay is available, and what requirements must be met in each case.
- **Employees don't know what type of leave or accommodation applies to their situation:** Most employees don't know what they need to request or what is available to them (ex. parental, bonding, health conditions, intermittent, accommodations) based on their life event and often misclassify their leave and accommodation needs today creating manual work for HR teams managing leave requests.
- **Confusion about what time is paid, unpaid, or job-protected:** Employees often assume qualifying for leave means getting paid, and overall lack clarity on how employer pay, state benefits, and unpaid time work together.
- **No upfront visibility into how policies stack or interact:** Employees want to model scenarios (e.g., PTO + state leave + STD) and understand total time, pay, and job protection to plan for their leaves. They also want to understand how to order and/or stack different types of leaves in a way that is advantageous to them.
- **Rigid systems don't handle combined leave + accommodation needs:** Real-world cases like pregnancy often require both accommodations and leave, but current tools don't guide employees through blended support paths.

Employees need to:

1. **Explore leave options** for anticipated life events without triggering formal requests

2. **Understand policy interactions** (how FMLA, state leave, and benefits stack)
3. **Visualize leave timelines** showing paid vs. unpaid periods and job protection
4. **Determine eligibility** based on their specific employment situation
5. **Plan financially** by understanding wage replacement percentages and gaps

HR Pain Points:

- Repetitive questions about leave eligibility
- Time spent explaining complex policy interactions
- Risk of setting false expectations during informal conversations
- Difficulty providing consistent information across the organization

The Solution

- Conversational interface that guides users through a natural, adaptive question flow
- Visual timeline generation showing leave periods, paid leave periods, and job-protected leave periods
- Eligibility and Entitlement determination (limited scope defined below)
- Clear disclaimers on what the agent does not do or consider
- Scenario modeling for "what-if" planning

Leveraging AI

AI is essential for this solution because:

1. **Natural Language Processing** enables employees to describe situations in their own words rather than regulatory terms
2. **Dynamic Questioning** adapts the flow based on state, leave type, and user responses
3. **Contextual Guidance** provides relevant information without overwhelming users
4. **Explainable Decisions** shows which inputs drove eligibility determinations

In Scope vs. Out of Scope for V1 February Build

	In Scope	Out of Scope
Functionality	• AI-powered conversational interface with integrated Rich UI • Natural language processing for entitlement and eligibility projection	• Case submission to employers (HR or case managers) • Direct integration with employer HRIS systems • State benefit application assistance or direction to

	• Explainable AI showing decision factors • Mobile-responsive design • Anonymous usage (no login required) • Session-based data storage only • Educational disclaimers throughout • Leads capture within the product	state portals • Paid features or billing including payment collection • User accounts or profile management
Policies	• All Federal and state policies • 13 key municipal policies	• Employer-specific benefit plans • LTD and STD policies that are not state entitlements • Union and CBA policies • ADA (Americans with Disabilities Act) eligibility/entitlements • PWFA (Pregnant Workers Fairness Act) accommodations • Workers' compensation leave • Vacation and all sick leave policies
Eligibility	• **Leave Event Assessment:** ◦ Covered reasons for leave under applicable policies ◦ Family member relationship verification (spouse, child, parent, etc.)	• Prompting users to confirm: ◦ Employer size and coverage requirements, as they are typically not relevant ◦ Temporary / Seasonal employment, contractors

	◦ Natural language mapping to regulatory leave categories • **Eligibility Factors:** ◦ Hours worked requirements: Full-time / Part-time status and/or average hours worked history ◦ Employer tenure calculations (hire date and length of service) ◦ Work hours history (for FMLA's 1,250 hour requirement) ◦ Pay Type (Hourly/Salaried) to determine pay replacement	
Entitlement	• Overall entitlement duration available at the policy level • Leave Start and end date calculations based on leave event dates • Policy-specific nuance questions eg. (Medical complications, Pre-birth leave needs, Method of delivery (cesarean vs. vaginal), Multiple births considerations based on rules engine need) • Paid vs. unpaid designation by date range	• Past leave usage consideration or remaining balance calculations • Actual payment calculations or payroll processing

	◦ including Wage replacement percentages (where standardized by law) • Job protection status and coverage dates • Benefits continuation during leave • Visual timeline representation of all benefits	

Nice To Haves:

- Affordances for PWFA and ADA applicability (can be lite)
- Policies: Military leave (USERRA), Jury duty, Voting leave, Bereavement leave User Stories
- Optional email capture for results
- Export/save timeline functionality
- Multi-language support

V1 — Free Leave Planning Tool (February 2025)		
Title	**User Story**	**Detailed Acceptance Criteria**
Platform Accessibility	As an employee, I want to access the leave planning tool from any device I have available, so that I can explore my options whether I'm at home on my computer or on-the-go with my phone.	• Fully responsive design that adapts to screen sizes • Mobile-optimized touch interactions for interactive elements • Timeline visualization scales appropriately for mobile screens • Conversational interface optimized for mobile keyboard input • WCAG 3.0 AA compliant
Anonymous Usage and Lead Generation	As an employee, I want to explore my leave options without creating an account or providing identifying information, so that I can	• Employee can access the leave planning tool directly from the marketing site without authentication. • No login, registration, or personal identifiers (name, email, phone,

	privately learn about my benefits without concern about my employer being notified.	employee ID, employer) are required at any point. • Any optional inputs use general, non-identifying categories (e.g., state, job type, salary range). • The tool clearly states that no data entered will be shared with an employer. • Session-based storage only, no PII retained • Email capture to save/send results • Lead routing to sales for employer interest
Analytics and Tracking	As an AbsenceSoft Product Manager, I want to launch the public leave planning tool to drive traffic to the marketing website and observe real-world user behavior so that I can learn from usage patterns and continue refining the AI-powered planning experience.	• Tool is accessible from the marketing website via a clearly promoted entry point (e.g., "Explore Your Leave Options"). • Usage analytics are enabled (e.g., funnel steps, completion rate, drop-off points, question paths taken, traffic volume, repeated usage, state distribution, most selected leave intents). • Analytics exclude any personally identifiable information and meet privacy requirements. • Feedback loops are in place (e.g., thumbs-up/down, free-text comments) to capture qualitative insights.
Natural Language Leave Exploration	As an employee, I want to describe my leave situation in my own words, so that I can explore my options without knowing regulatory terminology.	• Employee can enter free-form text like "I'm having a baby in May" or "My dad is sick" AI correctly maps natural language to regulatory leave absence reasons with ?%+ accuracy

		• System handles ambiguous inputs by asking clarifying questions • System shows which user inputs were used to determine eligibility (explainability) • Works on mobile and desktop devices • No login required

Eligibility Inputs	As an employee, I want to enter all required information so I can confidently know which leave policies I qualify for based on my specific employment situation and state, so that I understand all my available leave options.	• User can anonymously provide employment status (full-time/part-time), hire date, work hours history, pay type (hourly/salary), and state/municipality of employment.
		• System calculates tenure based on the hire date provided.
		• System evaluates work-hours history to determine whether hour-based eligibility thresholds (e.g., FMLA's 1,250 hours) are met.
		• System determines eligibility for:
		  ◦ Federal leave policies
		  ◦ All 50 state leave entitlements
		  ◦ 13 in-scope municipal policies
		• System maps the user's natural-language description of their leave event to regulatory categories (e.g., bonding, medical, caregiving).
		• System validates family member relationships against allowed kinship rules for each entitlement
		• Chat surfaces the appropriate questions based provided leave event details and rules engine implications
		• Leave planning results are not provided until there is x% confidence

		that required information has been collected • If the employee cannot provide one or more required data points (e.g., hours worked), the system must still generate a provisional eligibility assessment that clearly indicates which assumptions were used, what information is missing, and how that missing information may affect the accuracy of the results
Entitlement Inputs	As an employee, I want the tool to calculate how much leave I may be entitled to under applicable federal, state, and municipal policies, so that I can clearly understand the duration, wage replacement, job protection, and benefits coverage available for my leave event.	• System uses the user's leave event details (e.g., expected start date, type of leave, medical/bonding/caregiver needs, pay rate) to determine relevant entitlement rules and required questions to determine entitlement. • System factors in required nuances such as medical complications, pre-birth leave needs, delivery method (cesarean/vaginal), and multiple births where relevant to the rules engine. • Chat surfaces the appropriate questions based provided leave event details and rules engine implications • Leave planning results are not provided until there is x% confidence that required information has been collected • If the employee cannot provide one or more required data points (e.g., delivery method), the system must still generate a provisional eligibility assessment that clearly indicates which assumptions were used, what information is missing, and how that

		missing information may affect the accuracy of the results

UX AI Guardrails	As an employee, I don’t want inferences made about my leave event that are sensitive like severity of the condition, specific diagnoses, medical advise, relationships, or medical outcomes or the likelihood of approval or denial of my leave claim.	• need to set guardrails on tone and phrasing
		• guardrails on what the AI can infer and what it case ask
		• The agent must not infer meaning from symptoms, situations, or personal statements beyond:
		  ◦ Confirmed data
		  ◦ User-provided facts
		  ◦ Rule-engine outputs
		  ◦ Explicit policy configuration
		• Question UX per question type

AI Explainability	*As an employee, I want the tool to clearly explain how it arrived at its recommendations, so I can trust the accuracy of the information and understand the factors influencing my results.*	• Present the user with a clear recap of their inputs and highlight the exact factors the system evaluated to determine eligibility and entitlement outcomes.
Visual Leave Timeline Generation	As an employee planning leave, I want to see a visual timeline of my leave periods, understand if it's paid or unpaid, if my job and benefits are protected, so that I can plan financially for my absence and focus on my life event	• Timeline shows start and end dates for each eligible policy • timeline shows pay and unpaid status of each policy duration • Wage replacement percentages shown where applicable and based on user entered salary/pay details • Color-coded segments for different leave types or policies (federal, state, employer) • Clear indication of paid vs. unpaid periods ◦ Warning if gaps exist between policies

		• Job protection status and dates clearly indicated • Mobile-responsive visualization • Disclaimer that timeline is educational projection only and does not account for past usage • Nice to have: Interactive timeline allows date adjustments or other entitlement adjustments
Anonymous Usage and Lead Generation	As an employee, I want to explore leave options without providing personal information, so that I can learn about benefits privately while having the option to save my results.	• No login or registration required to start • Session-based storage only, no PII retained • Optional email capture to save/send results • Clear value proposition for providing contact info • GDPR/CCPA compliant data handling • •Option to clear session data • Lead routing to sales for employer interest
Lead Generation for SMB market	As a Product Manager, I want the Leave Planning tool to collect contact information from interested users through embedded forms so that our sales team can generate and follow up on qualified SMB leads.	• The tool must include a form or CTA that allows users to submit contact information (e.g., name, company, email, and company size). • Form submissions must be stored in or routed to the appropriate CRM or lead intake system used by Sales. • Submissions must be tagged or identifiable as "SMB lead from Leave Planning tool." • The submission process must comply with privacy, consent, and data-handling standards. • The form must be optional and not block the core Leave Planning experience.

		• Form must capture company size
Post V1 - 2026 Work		
Title	**User Story**	**Detailed Acceptance Criteria**
Handling of ADA and PWFA in leave planning	As an employee, I want to understand *all options* available to me—leave, accommodations, or both—so I can make the right request and get the support I need to stay healthy and employed.	• The system identifies when an employee's input (e.g., "pregnancy complications," "surgery recovery," "mental health condition") may trigger potential ADA or PWFA coverage. • The system does not require the employee to explicitly choose "ADA" or "PWFA" to begin receiving relevant guidance.
Past Leave Usage Consideration	As an employee, I want the tool to account for any leave I've already taken, so that I get accurate remaining entitlement projections.	• State and federal leave balance tracking accounts for past usage • Clear indication when benefits exhausted • Warning when approaching limits • Reset date projections
Clear Next Steps	As an employee, I want to understand what I need to do to receive the leave that has been projected to me.	• Direction to state leave administered leave applications • Company specific next steps for eigible leavesleave
Employer Policy Integration	As an employee at a participating company, I want to see my company-specific leave policies included, so that I get a complete picture of all my benefits.	• Company policy layer added to timeline • STD/LTD benefit projections • • Union contract considerations (nice to have)
Direct Case Submission	As an employee ready to request leave, I want to submit my request directly from the planning tool, so that I don't have to re-enter information.	• One-click conversion to formal request to employer • Pre-populated intake forms for leave planning information • Document upload capabilitities

		• Employer notification workflow • Case tracking integration • Confirmation and next steps • Transition to case management
AI Explainability	*As an employee, I want the tool to clearly explain how it arrived at its recommendations, so I can trust the accuracy of the information and understand the factors influencing my results.*	• NotebookLM-like citations to regulations and policies

Risks and Assumptions

Assumptions:

- Users have basic information about their employment (hire date, hours worked)
- Rules engine has sufficient coverage for common leave events

Risks:

- Rules engine may not have complete coverage for all natural language leave reasons
- Rules engine may not have pay information
- AI hallucination risk in benefit explanations
- Projections could be misinterpreted as benefit guarantees
- Free tools from competitors could commoditize the space
- limited scope or inaccurate projections could provide reputational risk

Mitigation Strategies:

- Comprehensive disclaimer system
- Regular compliance review of outputs
- Continuous accuracy monitoring

Validation and Testing Strategy:

1. **Separate Testing Cohorts:**
    - Initial training: 100 scenarios across common leave types
    - User acceptance testing before release:
        - test scenarios not used in training
2. **UAT Accuracy Testing:**

    - test scenarios not used in training
    - Work with AS internal teams to:
        - Verify eligibility determinations against manual calculations
        - Validate entitlement against manual calculations
    - Test edge cases and policy interactions
    - Verify decision factors are clearly shown
    - Test natural language understanding accuracy
3. **User Experience Testing:**
    - Comprehension of projections vs. guarantees
    - Completion rates and drop-off points
    - Clarity of visual timelines
    - Verify decision factors are clearly shown

Goals

1. Credibility and brand positioning: We're launching a new product for a segment where we haven't historically had success. The free tool demonstrates that AbsenceSoft can deliver modern, AI-powered, frictionless solutions, not just enterprise software. When downmarket HR buyers evaluate us, we want them to already believe we know our stuff.
2. Competitive parity: Aidora already has a free leave planning tool and it looks like Tilt is also working on something similar. If prospects compare us and see that we don't have this capability, it signals that our competitors are more innovative. Having a comparable (or better) tool will lower that risk.
3. Product validation: This will allow us test the conversational UI at scale, identify common questions and edge cases, and refine the experience before it's embedded in the paid product.
4. Momentum: Shipping something in Q1 gives us a milestone to rally around, something to announce and market, and proof to Luminate and thrv that we're executing on the new strategy.

Success Metrics

Credibility and Brand Positioning

Monthly Active Users

Organic Search Traffic

Social Media Mentions?

Backlinks (blog posts, publications, etc.)

Win/Loss Interview Mentions

Sales Call Discovery - Can we track the leave planner as a lead source?

Competitive Parity

Product Validation

Momentum

Original metrics below:

How do you also measure the outcome you want to truly measure and know that you are differentiating?

1. Within 4 months of launch, generate a ≥ Y% increase in qualified SMB inbound leads attributable to the Leave Planning tool, as measured by
   a. form submissions
   b. demo requests,
   c. content engagements tied to the tool's usage.
2. The Leave Planning tool should achieve a Session Completion Rate of ≥80% within 4 months of launch, where completion is defined as a user who reaches the eligibility & entitlement results section after beginning the question flow.9.1 Metrics
3. The Leave Planning tool should achieve ≥ X Monthly Active Users within 4 months of launch, measured as unique users who initiate or complete a planning session.
4. Achieve a User Satisfaction Score of ≥ 80% based on the thumbs-up / thumbs-down survey presented at the completion of the Leave Planning session. Survey is to gauge overall experience and/or confidence in understanding leave options.
5. The Leave Planning tool should achieve a Projection Accuracy Rate of ≥ X%, defined as the proportion of projected eligibility, entitlement, or leave duration outcomes that match the final validated outcomes once the case is reviewed by AbsenceSoft internal compliance teams. Projection accuracy will be reviewed internally at regular post-launch intervals (e.g., 30 days, 90 days, and quarterly thereafter) to ensure ongoing quality, identify drift, and refine the projection logic as needed.

9.3 North Star Metric

Employee Confidence Score: Self-reported confidence in understanding leave options (pre vs. post tool usage), measured by survey input.

Launch Criteria:

- 95% accuracy on eligibility determinations
- 90% accuracy on entitlement calculations
- 80% user comprehension of projection disclaimers
- 60% session completion rate

Go To Market

Positioning for Marketing Team

Internal Stakeholders:

External Communication:

Rollout Strategy

Open Questions

Question	DRI
Is the current rules engine expansive enough to handle natural language mapping to covered leave events and conversational UI?	
Do we need additional training data? Leave intent examples? clarification path examples? synonym and paraphrasing examples?	
How are we controlling tone and phrasing of the chat?	
Are users going to respond better to a true chat only interface or a RICH ui with form components?	@Corey Lucius
What are the requirements for conversational flow and tone?	
What is our testing and compliance quality assurance plan?	
What are the items that must never be inferred? What AI guardrails need to be put in place?	