

PAID FAMILY LEAVE CLAIMANT CHECKLIST - MILITARY

Have you taken time off from work to assist with matters arising from a family member's call to active duty or deployment?



PRE-FILE A CLAIM

STEP 1: COMPLETE NYSIF PFL-1

- Check "Military Qualifying Event" in Question 1.
- Check the "Pre-file a Claim" box in Question 3.

STEP 2: PROVIDE NYSIF PFL-1 TO EMPLOYER

Employer completes NYSIF PFL-1, Part B, and returns to you within three days.

STEP 3: COLLECT SUPPORTING DOCUMENTATION

Proof of your relationship to the military member AND:

- Covered active duty orders; OR
- Letter from the military unit documenting impending call or order to covered duty; **OR**
- Documentation of military leave signed by the approving authority for military member's Rest and Recuperation.

STEP 4: SUBMIT NYSIF PFL-1 AND SUPPORTING DOCUMENTATION TO NYSIF

STEP 5: FIRST DAY TAKEN TO ASSIST WITH MATTERS ARISING FROM A FAMILY MEMBER'S **CALL TO ACTIVE DUTY OR DEPLOYMENT**

STEP 6: COMPLETE NYSIF PFL-5

Once leave begins, complete NYSIF PFL-5.

STEP 7: PROVIDE NYSIF PFL-5 TO EMPLOYER

Employer completes NYSIF PFL-5, Part B, and returns to you within three days.

STEP 8: SUBMIT NYSIF PFL-5 AND ADDITIONAL SUPPORTING DOCUMENTATION TO NYSIF

AS NEEDED: SUBMIT NYSIF PFL-5T TO NYSIF

FILE A CLAIM

STEP 1: FIRST DAY TAKEN TO ASSIST WITH MATTERS ARISING FROM A FAMILY MEMBER'S CALL TO ACTIVE DUTY OR DEPLOYMENT

STEP 2: COMPLETE NYSIF PFL-1

- Check "Military Qualifying Event" in Question 1.
- Check the "File a Claim" box in Question 3.

STEP 3: COMPLETE NYSIF PFL-5

Once leave begins, complete NYSIF PFL-5.

STEP 4: PROVIDE NYSIF PFL-1 & NYSIF PFL-5 TO YOUR EMPLOYER

Employer completes Part B on both forms and returns to you within three days.

STEP 5: COLLECT SUPPORTING DOCUMENTATION

Proof of your relationship to the military member **AND**:

- Covered active duty orders; OR
- Letter from the military unit documenting impending call or order to covered duty; **OR**
- Documentation of military leave signed by the approving authority for military member's Rest and Recuperation.

STEP 6: SUBMIT NYSIF PFL-1, NYSIF PFL-5 AND SUPPORTING DOCUMENTATION TO NYSIF

AS NEEDED: SUBMIT NYSIF PFL-5T TO NYSIF

Send completed forms to:

NYSIF Document Control Center, Disability Claims 1 Watervliet Ave Ext, Albany, NY 12206 or fax to 518-437-5201.

You must submit all claims forms to NYSIF within 30 days after the start of the leave. Failure to do so may affect benefits. NYSIF accepts or denies claim within 18 days. You do not need to wait for this decision to start your leave. Please keep a copy of all pages for your records.



NEW YORK STATE INSURANCE FUND Notice and Proof of Claim for Paid Family Leave

Request For Paid Family Leave (NYSIF Form PFL-1) Instructions

- . Be sure to follow the instructions on the NYSIF PFL Claim checklist for the type of leave you are requesting.
- · Complete Part A and sign.
- Provide Part B to your employer for completion. If the employer does not complete any of Part B, you must provide the missing information.
- Additional forms are required depending on the type of leave being requested. You must submit NYSIF PFL-1
 with the required additional form(s) to NYSIF within 30 days after the start of leave. Failure to do so may affect
 benefits. Please retain a copy of each submitted form for your records.

PART A - EMPLOYEE INFORMATION (to be completed by the employee)

The employee requesting PFL must complete all fields, unless otherwise noted as optional.

Question 2: A child is defined as a biological, adopted, or foster son or daughter, a stepson or stepdaughter, a legal ward, a son or daughter of a domestic partner, or the person to whom the employee stands in loco parentis. A parent is defined as a biological, foster, or adoptive parent, parent-in-law, a stepparent, a legal guardian, or other person who stood in loco parentis to the employee when the employee was a child.

Question 3: To pre-file a claim, the following has not yet occurred:

- First date care is needed for family member with a serious health condition; OR
- Birth date, placement or adoption date, or date leave begins to facilitate placement or adoption; OR
- First date leave needs to be taken to assist with a military call to duty or active deployment.

Question 14:

- If dates are "Continuous," the employee must provide the start and end dates of the requested PFL. These dates should be the actual dates that the PFL will begin and end.
- If dates are "Intermittent," enter the dates PFL will be taken. Please be as specific as possible.
- If uncertain, estimate the start and end dates and indicate "Dates are estimated." If dates are estimated, NYSIF may require you to submit a request for payment after the PFL day is taken. Payment for approved claims will be due as soon as possible but in no event more than 18 days from the date of the completed request.

Question 15: If the employee is submitting a PFL request to their employer with less than 30 days' advance notice from the start date of the PFL, the employee must explain why 30 days' notice could not be given. If the explanation will not fit in the space provided on the form, enter "See Attached" and add an attachment with the explanation. Be sure to include the employee's full name and their date of birth at the top of the attachment.

PART B - EMPLOYER INFORMATION (to be completed by the employer)

The employer of the employee requesting PFL must complete all information in Part B.

Question 3: Enter the employer's Standard Industrial Classification (SIC) Code. Visit the U.S. Department of Labor to determine your SIC code:

www.osha.gov/pls/imis/sic manual.html

Question 8: The employee occupation code can be found at: www.bls.gov/soc/2018/major_groups.htm

Questions 9 & 10: Please ensure the employer's policy number is provided, along with NYSIF's information.

Question 11: Affirmation employee is eligible for PFL: An employee who regularly works 20 hours or more per

An employee who regularly works 20 hours or more per week must have been in employment for at least 26 consecutive weeks. An employee who regularly works less than 20 hours per week must have worked 175 days.

Employer must sign and date, and return to the employee requesting PFL within three business days.

Notification Pursuant to the New York Personal Privacy Protection Law (Public Officers Law Article 6-A) and the Federal Privacy Act of 1974 (5 USC 552a)

The Workers' Compensation Board's (Board's) authority to request that employees provide personal information, including their social security number or tax identification number, is derived from the Board's administrative authority under Workers' Compensation Law section 142. This information is collected to assist the Board in investigating and administering claims in the most expedient manner possible and to help it maintain accurate records. Providing your social security number or tax identification number to the Board is voluntary. The Board will protect the confidentiality of all personal information in its possession, disclosing it only in furtherance of its official duties and in accordance with applicable state and federal law.



Request For Paid Family Leave

(NYSIF Form PFL-1)

NEW YORK STATE INSURANCE FUND

PART A - EMPLOYEE INFORMATION (to be completed by the employee) Reason for Paid Family Leave (PFL) Request 1. Bond with child Care for family member Military qualifying event 2. The family member is the employee's: ÁÖ[{ ^•a3&Á,æd;}^¦ ÁÔ@Måå ÂÙ][ˇ•^ ÁÚæ\^} c Õ¦æ}å]æ}^}oÁ Õ¦æ)å&@¶å 3. Are you submitting this form to: Pre-file a Claim File a Claim (See NYSIF PFL Claim Checklist for more information.) 4. Employee's legal name (first name, middle initial, last name) Optional (for research purposes) 13. Employee's ethnicity/race 5. Other last names, if any, under which employee has worked For purposes of health demographic only. (U.S. Centers for Disease Control and Prevention (CDC) code set, version 1.0.) Is employee of Hispanic, Latino/a, or Spanish origin? 6. Employee's mailing address (One or more categories may be selected.) Street address Mexican Mexican American City State Chicano/a Puerto Rican Country (if not U.S.A.) Zip code Dominican Cuban Another Hispanic, Latino/a, or Spanish origin 7. Employee's Social Security Number or TIN Not of Hispanic, Latino/a, or Spanish origin Unknown 8. Employee's date of birth (MM/DD/YYYY) What is employee's race? (One or more categories may be selected.) American Indian or Alaska 9. Employee's primary telephone number Native Black or African American Asian Indian Chinese 10. Employee's preferred email address while on PFL (if available) Filipino Japanese Korean 11. Employee's gender Vietnamese Male Female Not designated/Other Other Asian White 12. Employee's preferred language Native Hawaiian English Español Русский Język polski Guamanian or Chamorro Italiano Kreyòl ayisyen 繁體字 하국어 Samoan Other Other Pacific Islander

Other race

Employee's name (first name, middle initial, last name) Employee's date of birth Employee's phone number
PART A - EMPLOYEE INFORMATION (to be completed by the employee) - continued from prior page
14. Will PFL be used for a continuous period of time or intermittent (non-consecutive)?
PFL start date (MM/DD/YYYY) Continuous PFL end date (MM/DD/YYYY) Dates are estimated**
Intermittent (PFL must be taken in full-day increments.) Identify dates of intermittent PFL: Dates are estimated**
**Note: You must confirm any estimated dates with NYSIF prior to receiving payment. 15. If providing less than 30 days' advance notice to the employer, please explain:
16. Business name
To. Business nume
17. Employee's work location:
Street address
City State Zip code
Disclosure statement: Information regarding PFL benefits received by the employee, such as payments and types of leave, will be provided to the employer.
Declaration and signature
Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.
I am hereby making a request for paid family leave benefits under the NYS Workers' Compensation Law. My signature affirms that the information I am providing is true and accurate to the best of my knowledge and belief. This includes any information I may provide in Part B - Employer Information.
Date signed (MM/DD/YYYY)

TO BE COMPLETED BY THE EMPLOYEE								
Employee's name (first name, middle initial, last name)	Employee's date of birth Employee's phone numl							
PART B - EMPLOYER INFORMATION (to be complete	ed by the employer)							
Business's full legal name and mailing address	, ,							
Business name								
Mailing address								
City	State	Zip code						
2. Employer's FEIN (or Social Security Number)								
3. Employer's Standard Industrial Classification (SIC) Cod	e www.osha.g	ov/pls/imis/sic_manual.html						
4. Employer's contact name for questions related to PFL:								
5. Employer's contact telephone number:	Ext.							
6. Employer's contact email address:								
7. Employee's date of hire:								
8. Employee's occupation code:	Occupational Codes Occupation:							
9. Employer's DB/PFL policy number:								
10. PFL insurance carrier's name and mailing address:								
PFL insurance carrier's name New York State Insura	ance Fund							
Mailing address NYSIF Document Control Center - Disability Claims 1 Watervliet Avenue Extension Albany, NY 12206								
Fax Number (518) 437-5201								
11. Declaration and signature								
I affirm the employee regularly works 20 or more hour consecutive weeks OR the employee regularly works								
Any person who knowingly and with intent to defraud any insurance collim containing any materially false information, or conceals for the procommits a fraudulent insurance act, which is a crime, and shall also be stated value of the claim for each such violation.	urpose of misleading, information conce	rning any fact material thereto,						
I am the person authorized to sign as the employer of the employee re and belief, the information I have provided is true and accurate.	questing PFL. My signature affirms that	to the best of my knowledge						
	Date signed (MM/DD	YYYY)						
Employer's authorized signature								
Title								



NEW YORK STATE INSURANCE FUND Notice and Proof of Claim for Paid Family Leave

Military Qualifying Event (NYSIF Form PFL-5) Instructions

If an employee is requesting PFL because of a family member's covered active military duty or impending covered active duty, the employee must submit *Military Qualifying Event (NYSIF Form PFL-5)*.

- . Be sure to follow the instructions on the NYSIF PFL Claim Checklist Military.
- You must identify the family member, provide a copy of the member's covered active duty orders or impending active duty orders, and describe the reason leave is being requested.
- Complete Part A and sign.
- Provide Part B to your employer for completion.
- If the employer fails to complete any of Part B, you must provide the missing information. This includes proof of wages if the employer does not complete question 11.
- With your completed NYSIF PFL-5, please submit proof of your relationship to the military member. Acceptable documentation includes but is not limited to marriage license; court documents for adoption, foster care, guardianships; birth certificates; affidavit; proof of common ownership or property; etc.
- You must submit all forms to NYSIF within 30 days after the start of leave. Failure to do so may affect benefits. Please retain a copy of each submitted form for your records.

PART A. MILITARY QUALIFYING EVENT (to be completed by the employee)

The employee requesting PFL must complete all applicable requested information.

Questions 1-4: Enter the military member's information.

Question 5: Enter dates of expected military covered active duty.

Question 6: Documentation that shows that the military member is on covered active duty or has been notified of an impending call or order to covered active duty is required and must be attached to this form. Select the type of documentation that is attached from the list below.

Required documentation includes one of the following:

- · Covered active duty orders; OR
- Letter from the military unit documenting impending call or order to covered duty; **OR**
- Documentation of military leave signed by the approving authority for military member's Rest and Recuperation.

Question 7: Check the box(es) that describe the need for PFL because of the Military Qualifying Event. If the reason does not appear here, please check other and elaborate in the box provided.

Question 9: Include one or more of the qualifying supporting documents:

- Meeting announcement for informational briefing sponsored by the military; or
- Document(s) confirming an appointment with a school official, doctor, attorney or financial advisor; or
- Copy of a bill for services for the handling of legal or financial affairs.

Notification Pursuant to the New York Personal Privacy Protection Law (Public Officers Law Article 6-A) and the Federal Privacy Act of 1974 (5 USC 552a)

The Workers' Compensation Board's (Board's) authority to request that employees provide personal information, including their social security number or tax identification number, is derived from the Board's administrative authority under Workers' Compensation Law section 142. This information is collected to assist the Board in investigating and administering claims in the most expedient manner possible and to help it maintain accurate records. Providing your social security number or tax identification number to the Board is voluntary. The Board will protect the confidentiality of all personal information in its possession, disclosing it only in furtherance of its official duties and in accordance with applicable state and federal law.

PART B - EMPLOYER INFORMATION (to be completed by the employer)

The employer of the employee requesting PFL must complete all information in Part B.

Question 9: Failure to select "Yes" for requesting reimbursement from NYSIF will result in a waiver of the right to reimbursement. If answering "Yes," the employer must provide the dates that full wages were paid.

Question 11: Enter the wages earned by the employee during the last eight weeks preceding the PFL start date. The gross amount paid is the employee's gross weekly pay, including any overtime and tips earned for that week. Calculate the gross average weekly wage by adding up the gross amounts paid, and then divide by eight (or number of weeks worked if less than eight).

Step 1: Add all gross wages received (before any deductions) over the last eight weeks prior to the start of PFL, including overtime and tips earned. (See Step 3 for instructions for calculating bonuses and/or commissions.)

Step 2: Divide the gross wages calculated in step one by eight (or the number of weeks worked if less than eight) to calculate the average weekly wage. **Step 3:** If the employee received bonuses and/or commissions during the 52 weeks preceding PFL, add the prorated weekly amount to the average weekly wage. To determine the prorated weekly amount, add all bonuses/commissions earned in the preceding 52 weeks and then divide by 52.

Example of a gross weekly wage calculation:

Week 1 - Gross wage, including overtime	\$550
Week 2 - Gross wage	\$500
Week 3 - Gross wage	\$500
Week 4 - Gross wage	\$500
Week 5 - Gross wage	\$500
Week 6 - Gross wage	\$500
Week 7 - Gross wage, including overtime	\$600
Week 8 - Gross wage, including overtime	+\$550
Total =	\$4,200
Divide by 8	÷ 8
Average Weekly Wage =	\$525
Bonus earned in preceding 52 weeks	\$2,600
Divide by 52	÷ 52
Prorated Weekly Bonus =	\$50
Average Weekly Wage	\$525
Prorated Weekly Bonus	+ \$50

Average Weekly Wage (including bonus):

Question 12: 'Disability' refers to NYS statutorily-required disability.

\$575

Question 13: The maximum number of weeks available for NYS statutory disability and PFL in any 52 week period is 26 weeks. Specify the total number of weeks, as well as the number of additional days if the leave includes a partial week, taken for NYS statutory disability and PFL during the preceding 52 weeks.

Employer signs and dates, and then returns to the employee requesting PFL within three business days.

Notification Pursuant to the New York Personal Privacy Protection Law (Public Officers Law Article 6-A) and the Federal Privacy Act of 1974 (5 USC 552a)

The Workers' Compensation Board's (Board's) authority to request that employees provide personal information, including their social security number or tax identification number, is derived from the Board's administrative authority under Workers' Compensation Law section 142. This information is collected to assist the Board in investigating and administering claims in the most expedient manner possible and to help it maintain accurate records. Providing your social security number or tax identification number to the Board is voluntary. The Board will protect the confidentiality of all personal information in its possession, disclosing it only in furtherance of its official duties and in accordance with applicable state and federal law.



Request For Paid Family Leave

Military Qualifying Event (NYSIF Form PFL-5) NEW YORK STATE INSURANCE FUND

TO BE COMPLETED BY THE EMPLOYEE			
Employee's name (first name, middle initial, last name)	Employee'	s date of birth	Employee's phone number:
Other last names, if any, under which employee has wo	rked Employ	ee's Social Securi	ty Number or TIN
Employee's mailing address Mailing address			
City	State	Zip code	Country (if not U.S.A.)
PART A. MILITARY QUALIFYING EVENT (to be con 1. Name of military member on covered active duty or			duty status (international
deployment) (first name, middle initial, last name)			
2. Military member's date of birth (MM/DD/YYYY)			
3. Military member's gender Male Female	Not designated/Oth	er	
4. Military member's mailing address Mailing address			
City	State	Zip code C	Country (if not U.S.A.)
5. Period of military member's covered active duty (MM	/DD/YYYY)		
Please select one of the following and attach the ind covered active duty or impending call or order to co Covered active duty orders Letter of impending call or order	vered active du	ty status: Documentation of	military leave signed by the approving
Qualifying Reason For Leave (to be completed by	the employee)	authority for milita	ry member's Rest and Recuperation
7. What is the reason employee is requesting PFL? (On		nay he selected \	
_	ent activities, includi eration	,	
Parental care			

TO BE COMPLETED BY THE EMPLOYEE		
Employee's name (first name, middle initial, last name)	Employee's date of birth	Employee's phone number
PART A. MILITARY QUALIFYING EVENT (to be completely	eted by the employee) - continued	d from prior page
8. Are you receiving any of the following: workers' compensati	on, disability or unemployment insur	rance benefits? Yes No
9. Is written documentation supporting this request for lea	ve available and attached?	es No None Available
Note: A complete and sufficient certification to support a request for PFL lea supports the need for leave; such documentation may include a copy of a m document confirming the military member's Rest and Recuperation leave; a school official, or staff at a care facility; or a copy of a bill for services for the the employee must provide the supporting documentation of the meeting that entity with whom you are meeting (i.e., either telephone number, fax numbers.)	eeting announcement for informational briefing document confirming an appointment with a th handling of legal or financial affairs. If leave is at includes the name, address, appropriate con	ps sponsored by the military; a hird party, such as a counselor or requested to meet with a third party,
Declaration and signature		
Any person who knowingly and with intent to defraud any insurance compan any materially false information, or conceals for the purpose of misleading, ir which is a crime, and shall also be subject to a civil penalty not to exceed five I am hereby making a request for paid family leave benefits under the NYS V providing is true and accurate to the best of my knowledge and belief. This ir	formation concerning any fact material therel e thousand dollars and the stated value of the Vorkers' Compensation Law. My signature af	to, commits a fraudulent insurance act, e claim for each such violation. firms that the information I am
Employee's signature:		
Employee a dignature.	Date signed (MM/DD/YY)	(Y)
PART B - EMPLOYER INFORMATION (to be completed	by the employer)	
Business's full legal name and mailing address	by the employer)	
Business name		
Dusilless Hallie		
Mailing address		
City	State	Zip code
2. Employer's FEIN		
3. Employer's NYSIF DB/PFL Policy Number:		
4. Employer's contact name for questions related to PFL:		
	Evé	
5. Employer's contact telephone number	Ext.	
6. Employer's contact email address:		
7. Employee's date of hire:	nployee's last work day prior to lea	ave: / / /
8. Is the employee taking Family Medical Leave act (FMLA)	concurrently with PFL? Yes	No
9. If employee received or will receive full wages while on F	FL, will employer be requesting re	eimbursement? Yes No
If yes, please provide start and end dates for the period t	he employee received full wages:	
Start date:	End Date:	

т.	DE COM	DI ET		LOVEE							
TO BE COMPLETED BY THE EMPLOYEE											
Employee's name (first name, middle initial, last name) Employee's date of birth Employee's phone number					ber						
PAI	RT B - EM	PLOY	ER INFORMATI	ON (to be	completed by the	e em	ployer) - continued fro	om previous	page		
	Is the em			-	LLP or LLC		Self-Employed	None			
									on to determin	e wages and	d enter
	If "None" is selected, please go to Question 11. For Member of an LLP/LLC or Self-Employed, please use the following calculation to determine wages and enter it in the "Calculated average gross weekly wage" box. Divide: <the 52-week="" immediately="" in="" income="" leave="" net="" of="" period="" preceding="" the="" total=""> by <52>. Please provide documentation to support the last 52 weeks of wages, such as pay stubs or your most recent tax return.</the>										
11.	Enter the	e last	8 weeks of gros	s wages	for the employee	and	calculate the average	gross weekl	y wage:		
	Week no.	Week	ending date (MM/D	D/YYYY)	Number of days wor	ked	Gross amount paid				
	1										
	2										
	3										
	4										
	5										
	6										
	7										
	8										
		Calc	ulated <u>average</u> ç	ross we	ekly wage:						
12.	In the pre	ecedir	ıg 52 weeks, has	the emp	oloyee taken leave	for	NYS Disability	PFL Bot	h Disability &	PFL	None
13.	Enter the	total	number of weel	s and da	ays taken for both	Disa	ability and PFL in the I	ast 52 week	s:		
			Weeks								
	Disabi	litv:	VVEEKS	Plea	ase provide specific date	es ioi	Disability				
		,	Days								
PFL:			Weeks	Please provide specific dates for PFL							
			Days								
Dec	laration a	ınd siç	gnature								
					•		k and has been in employ nd has worked at least 17		ast 26 cons	ecutive we	eeks
any	person who materially fa	knowin	gly and with intent to rmation, or conceals	defraud ar	ny insurance company pose of misleading, info	or oth	ner person files an applicatio ion concerning any fact mate	n for insurance erial thereto, co	mmits a fraud	dulent insura	ance act,
			•	•	•		and dollars and the stated v				
	I am the person authorized to sign as the employer of the employee requesting PFL. My signature affirms that to the best of my knowledge and belief, the information I have provided is true and accurate.										
			Employer's auth	orized sigr	nature		Date sign	ed (MM/DD/\	YYY)		
			Ti	tle							

NYSIF PFL-5 (6/18) Military Page 3 of 3

TO BE COMPLETED BY THE EMPLOYEE								
Employee's name (first name, middle initial, last name)	Employee's date of b	Employee's date of birth Employee's phone number						
Other last names, if any, under which employee has worked	Employee's Social	Security Number or TIN						
	-	-						
Employee's mailing address								
Mailing address								
City	ate Zip code	Country (if not U.S.A.)						
QUALIFYING REASON FOR LEAVE - DOCUMENTA	TION							
the name, address, and appropriate contact information of the individual or entity with whom you are meeting (i.e., either the telephone number, fax number or email address of the individual or entity). The reason for a meeting can include: arranging for child or parental care, counseling, making financial or legal arrangements, acting as the military member's representative before a federal, state or local agency for purposes of obtaining, arranging or appealing military service benefits, or attending any event sponsored by the military or military service organizations. Please submit this documentation for each required meeting/event to NYSIF.								
Name of individual with whom employee is meeting Title								
Organization								
Telephone number (provide area or country code)								
Fax number (provide area or country code)								
Email address								
Mailing address Mailing address								
3								
City, State	Zip code	Country (if not U.S.A.)						
Describe nature of meeting. Include dates, if known:								