

Checklist for Requesting Colorado Paid Family and Medical Leave

Before you apply for CO PFML:

- Check eligibility requirements for leave.**
- Plan your leave.** Leave can be taken continuously, intermittently, or on a reduced leave schedule. The minimum time increment is one (1) hour.
- Notify your CO employer** at least 30 calendar days before the start of leave (if the leave is foreseeable), otherwise, notify your employer as soon as possible.

Complete your claim form(s) and attach required documentation:

Please print information clearly. Incomplete or illegible claim packages may delay processing.

- Complete Claimant Statement, in full.** Sign and date the form, retain a copy for your files.
- Your CO employer completes the Employer Statement, in full.** They should make a copy for their files, and return the completed employer's statement to you.
- Complete the Certification or Attestation for your leave type (options on page 2) and attach supporting documentation as required.**

Submit fully completed claim package and supporting documentation to ShelterPoint

Completed claims for CO PFML benefits can be submitted to ShelterPoint by any of the below listed methods (choose one- do not submit by multiple methods). Please **do not** include instruction pages with your submission.

Email: claimforms@shelterpoint.com

Fax: 516-504-6414

Mail: ShelterPoint Life, 1225 Franklin Ave-Ste 475, Garden City NY 11530

Web address: shelterpoint.com/CO-

Phone #: 1-800-365-4999

Important Notes: it is the responsibility of the claimant to submit/file claims with ShelterPoint, as well as provide any and all required/requested missing information necessary to process the claim. The employer is required to provide the completed employer statement; **claim determinations and verification of eligibility for benefits will be made by ShelterPoint.**

Claims should be submitted no later than 30 calendar days after the 1st confirmed day of leave, to avoid losing benefits. If benefits are paid to you in excess of the amount to which you are entitled, you must return the amount overpaid to the payor of such benefits.

By completing and filing your application for Paid Family and Medical Leave benefits, you certify, under penalties of perjury, that to the best of your knowledge and belief, the information contained in the claim package is true, correct, and complete. Any false statements or other failure to provide truthful, accurate and complete information may result in monetary and other penalties as well as the possibility of criminal prosecution.

Checklist for Requesting Colorado Paid Family and Medical Leave

Qualifying Leave Types (select one)

NOTE: If utilizing more than 1 type of leave, a separate claim package must be completed for each leave type; multiple leaves may not be requested for the same period of time.

- Bonding Leave with a new child** (birth, adoption or foster placement)
 - Complete CO – PFML - BONDING CERTIFICATION form
 - Attach documentation as listed on the form, supporting your relationship with the new child

- Neonatal Care Leave**
 - Complete CO – PFML – NEONATAL CARE LEAVE form
 - Attach documentation as listed on the form, supporting your relationship with the new child and documentation illustrating admission to the Neonatal Intensive Care Unit.

- Medical Leave due to my own serious health condition** (including pregnancy/post-partum)
 - Complete the top portion of the CO – PFML – MEDICAL CERTIFICATION – SELF CARE form
 - Complete the HIPAA Authorization form and provide it to your health care provider, allowing medical information to be shared with ShelterPoint.
 - Your health care provider completes the remainder of the MEDICAL CERTIFICATION – SELF CARE form and returns the completed form to you.

- Caring for a family member with a serious health condition**
 - Complete the top portion of the CO - MEDICAL CERTIFICATION – FAMILY CARE form, providing information on yourself and your qualifying family member who requires care
 - Your family member completes the HIPAA Authorization form and provides it to the health care provider, allowing medical information to be shared with you and ShelterPoint.
 - Your family member's health care provider completes the remainder of the CO - MEDICAL CERTIFICATION – FAMILY CARE form and returns the completed form to you.

- Qualifying exigencies associated with a call to active duty overseas**
 - Complete the CO – PFML - MILITARY EXIGENCY ATTESTATION form
 - Attach proof documents supporting the leave (options listed on the form)

- Safe Leave**

If you or your family member are victims of domestic violence, sexual assault or abuse, harassment, or stalking, you may be eligible to receive up to 12 weeks of CO PFML benefits to seek medical or psychological care, to seek support from a victim services organization, to relocate, or to participate in any civil or criminal proceeding(s).

 - Complete the CO – PFML – SAFE LEAVE ATTESTATION form



Request for Colorado Paid Family and Medical Leave (CO PFML)

CO FAML I is the state plan name and
CO PFML is the program name administered by ShelterPoint.

Claim Number:

CLAIMANT STATEMENT

This Application ("Claimant Statement") is completed by the individual that is requesting paid leave benefits (the "Claimant" or "Employee"). Applications may be filed up to 30 days prior to the start of the requested leave, and up to 30 days after the start of the leave. A fully complete application for benefits includes a Claimant statement, employer statement, certification/attestation relating to the type of leave being requested, and supporting proof documentation for the leave. Claims filed outside this window may be denied unless good cause is provided for late filing. Claim filing is the responsibility of the individual that is requesting paid leave benefits. The claimant is responsible for providing any missing or additional requested information during the claim process and is responsible for informing all required parties of any changes to leave plans.

PRINT CLEARLY IN BLUE OR BLACK INK. MISSING OR INCOMPLETE INFORMATION MAY DELAY PROCESSING.

Demographic Information

1. Claimant's Legal Name (First Name, Middle Initial, Last Name):

First name | Middle initial | Last Name

2. Claimant's Mailing Address (Street Address (including apt/fl #), City, State, Zip):

Street address

City, State Zip

3. Claimant's Social Security Number or I-TIN:

Grid for Social Security Number or I-TIN: [][][][] - [][][] - [][][][][][]

4. Claimant's Date of Birth:

Grid for Date of Birth: [][] / [][] / [][][][]
MONTH DAY YEAR

5. Claimant's Gender:

- Male
- Female
- Not Designated/Other

6. Claimant's Primary Contact Phone Number & Type:

([][][]) [][][] - [][][][]
area code

- Mobile/Cellular Phone Home Phone Work Phone

7. Claimant's Contact Email Address:

By providing your contact information, you consent to ShelterPoint contacting you by any of the methods provided.

Leave Information

8. Reason for PFML Request (choose ONE option):

- Medical leave due to **my own** serious health condition
- Bond with my new Child
- Care for my Child in the Neonatal Intensive Care Unit
- Care for my Family Member with a serious health condition
- Safe Leave for myself or my family member due to domestic violence, harassment, sexual assault, or stalking
- Military Exigency

9. Family Member's Relationship* to the Claimant is:

- | | |
|---|--------------------------------------|
| <input type="checkbox"/> Self | <input type="checkbox"/> Child |
| <input type="checkbox"/> Spouse | <input type="checkbox"/> Grandparent |
| <input type="checkbox"/> Domestic Partner | <input type="checkbox"/> Grandchild |
| <input type="checkbox"/> Parent | <input type="checkbox"/> Sibling |

Individual who has a *significant personal bond* that is or is like a *family relationship**, regardless of biological or legal relationship, based on the totality of the circumstances surrounding the relationship (**affirm & provide detail in a. and b. below**)

a. I hereby assert that a family-like relationship exists between _____ (your name) and _____ (name of person you have a family-like bond with)

b. Describe how this relationship demonstrates a family relationship: _____

Form continues on next page

Claimant Name: _____ Claimant SSN: _____

Claimant Address: _____

Leave Information (continued from previous page)

10. Leave Pattern and Period(s) Requested:

Indicate whether leave will be taken continuously (all at once), or intermittently. Provide your leave dates and schedule, giving as much detail as possible. *Any changes to your leave plans and/or estimated dates, must be communicated to Us (and your employer) as soon as possible. You may not request any leave prior to the start of the CO PFML program (01/01/2024) Or the effective date of your Employer's Plan, whichever is later.*

Continuous Leave:

continuous uninterrupted period of leave for a single qualifying reason.

Leave Start Date

Enter the first date you are requesting continuous leave from work.

/ / - / /

month day year month day year

Leave End Date

Enter the last date you are requesting continuous leave through.

/ /

month day year

Intermittent Leave:

Leave in separate, non-consecutive time periods rather than a single span of time for a single qualifying reason; episodic time off

Leave Start Date

Enter the first date you are requesting INTERMITTENT leave from work.

/ /

month day year

Date(s) & Hour(s) Requested:

Reduced Leave Schedule:

A consistent but reduced work schedule for multiple weeks. Minimum time increment (1) hour

Leave Start Date

Enter the first date you are requesting REDUCED LEAVE from work.

/ /

month day year

Frequency of leave: (e.g., 4 hours per day or 2 days per week. Be specific)

11. Notice to Employer:

Foreseeable leave (a qualifying event such as a planned medical procedure/treatment for yourself/your qualified family member, or for the birth of/placement of a new child) requires advance notice to your employer. Unforeseeable leave (emergency basis or unexpected) requires notice to your employer as soon as practicable.

a. Was 30 day's advanced notice provided to your employer for this leave? Yes No

b. Date notice was provided to employer: / /

month day year

c. If 30 day's advance notice was not provided, explain why:

12. Other Types of Leave:

Provide detail on other types of benefits/leave taken or requested in the preceding 52 weeks, and whether it will extend through the current requested leave period covered by this claim

| Benefit Type | received | claimed | from <small>(mm/dd/yyyy)</small> | through <small>(mm/dd/yyyy)</small> |
|---------------------------------|--------------------------|--------------------------|-------------------------------------|--|
| a. Unemployment benefits (CSEA) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| b. Workers' Compensation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| c. CO FAMILI/PFML | <input type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |

Claimant Name: _____ Claimant SSN: _____

Claimant Address: _____

Employment Information

Provide information on your employment history in **Colorado**. This information will be verified with your employer. Do not include employment history outside of Colorado.

KEY TERMS:

Benefit year: Has the same meaning as application year as defined in C.R.S 8-13.3-503(1) and as described in C.R.S. 8-13.3-521(1)(b) meaning the 12-month period beginning on the first day of the calendar week in which an individual's benefit start date occurs.

Base period: the first four of the last five completed calendar quarters preceding the benefit year.

Wages: Includes but not limited to: Salary, hourly wage, overtime, tips, bonuses, commissions, piece rate, PTO, sick, or vacation time, disability benefits paid by employer **not** a third party, parental leave paid by employer **not** a third party, and the value of lodging or meals used as a credit toward minimum wage.

Wages does not include: Severance pay, deferred compensation contributions or payments, profit-sharing, pensions or retirement payment plans, expense reimbursement (mileage, travel, moving, per diems, etc.), non-monetary payments (except lodging or meals to the extent they're used as a credit towards minimum wage).

Example: Cindy requests CO PFML bonding leave with a leave start date of 01/17/2024. Her benefit year will begin on 01/17/2024. Cindy's base period for reporting wages is the **first (4) of the previous (5) completed quarters**. Based on her start date, the lookback quarters are 1. 10/1-12/2022 2. 01/01 – 03/2023 3. 04/1 – 06/2023 4. 07/1 – 09/2023 5. 10/01 – 12/2023. The gross wages from the **highest quarter** during these first 4 quarters (10/1/2022-09/30/2024) will be used to determine her average weekly wage (AWW).

Cindy's highest quarter earnings during the base period were in Q4 2022 when she earned \$14,000.00, making her AWW \$1,076.92. This AWW will be used to calculate her weekly benefit rate under CO PFML.

13. Give the Name and Details of Your Recent Employer(s):

If you had more than one employer in the base period (the first four of the last five completed calendar quarters preceding the benefit year), name all employers. Looking back to the previous 4 of the last 5 completed quarters prior to your application for leave, determine the quarter in which your wages were highest, and report that value in the "Gross Wages" column. You may be asked to provide supporting documentation of wages. Average hours and days worked per week is based off your Regular Work Schedule, averaged from the 4 weeks prior to your last day worked before leave.

Most Recent Employer

| Business Name, Address/City/St/Zip, Tax ID # | Avg # hours/week <small>(e.g. 40 hrs/wk)</small> | Avg # days/week <small>(e.g. 5 days/wk)</small> | Employment date(s) <small>(MM/DD/YYYY)</small> | Days of the Week usually worked: | Gross (\$) Wages in Base Period |
|--|---|--|---|---|---------------------------------|
| | | | Hire Date: Last Day Worked: | <input type="checkbox"/> Mo <input type="checkbox"/> Tu <input type="checkbox"/> We <input type="checkbox"/> Th <input type="checkbox"/> Fr <input type="checkbox"/> Sa <input type="checkbox"/> Su ----- <input type="checkbox"/> Schedule Varies | |

Other CO Employer(s)

If more than 3 recent CO Employers, please include details on a separate sheet.

| Business Name, Address/City/St/Zip, Tax ID # | Avg # hours/week <small>(e.g. 40 hrs/wk)</small> | Avg # days/week <small>(e.g. 5 days/wk)</small> | Employment date(s) <small>(MM/DD/YYYY)</small> | Days of the Week usually worked: | Gross (\$) Wages in Base Period |
|--|---|--|---|---|---------------------------------|
| | | | Hire Date: Last Day Worked: | <input type="checkbox"/> Mo <input type="checkbox"/> Tu <input type="checkbox"/> We <input type="checkbox"/> Th <input type="checkbox"/> Fr <input type="checkbox"/> Sa <input type="checkbox"/> Su ----- <input type="checkbox"/> Schedule Varies | |
| | | | Hire Date: Last Day Worked: | <input type="checkbox"/> Mo <input type="checkbox"/> Tu <input type="checkbox"/> We <input type="checkbox"/> Th <input type="checkbox"/> Fr <input type="checkbox"/> Sa <input type="checkbox"/> Su ----- <input type="checkbox"/> Schedule Varies | |

Form continues on next page

Claimant Name: _____ Claimant SSN: _____

Claimant Address: _____

Benefit Payment Preferences

Disclosure Statement: Information regarding PFML benefits received by the employee, such as payments received and leave schedule, will be provided to the employer.

14. Please choose your preference for receiving benefit payments. Certain options may not be available depending on the leave pattern or benefit recipient. If your claim does not qualify for ACH/direct deposit, your benefit payments will automatically be issued via paper check. A completed enrollment form is required to participate in direct deposit and proof of account information is required (e.g. a copy of a voided check from the issuing bank, or a written statement from the banking institution verifying account details).

- Paper Check
 Direct Deposit

Attestation and Signature:

NOTICE It is unlawful to knowingly provide false, incomplete, or misleading facts or information to an insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance, and civil damages. I further attest that if benefits are paid in excess of the amount to which I am entitled, I will return to the payor of such benefits, the amount that was overpaid, and I acknowledge that failure to do so may result in the accrual of interest and other penalties.

I am hereby making a request for benefits under the Colorado Family and Medical Leave Insurance program. My signature affirms that the information I am providing is true and accurate to the best of my knowledge and belief.

Signature

Date Signed

| | | | | | | |
|----------------------|---|----------------------|---|----------------------|----------------------|----------------------|
| <input type="text"/> | / | <input type="text"/> | / | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| month | | day | | year | | |

End of CO PFML - Claimant Statement.

Request for Colorado Paid Family and Medical Leave (PFML)

EMPLOYER STATEMENT

| | | | |
|--|--|--|--|
| Employee's Legal Name: | | Employee's SSN: | |
| Employee's Mailing Address: | | | |
| Employer Information (to be completed by the employer for the above named employee requesting CO PFML) PRINT CLEARLY IN BLUE OR BLACK INK. Missing or incomplete responses may delay processing. | | | |
| 1. Business's full legal name and mailing address <i>Business name (including any DBA or Trade Name)</i> | | | |
| Street address | | | |
| City, State Zip | | | |
| 2. Business's Federal Employer Identification Number (FEIN) | | 3. Employer contact person (Name & Title) for this leave request | |
| <div style="border: 1px solid black; padding: 2px;"> - </div> | | | |
| 4. Employer's contact phone # | | 5. Employer contact email address | |
| <div style="border: 1px solid black; padding: 2px;"> () - Ext: _____ <small style="margin-left: 20px;">area code</small> </div> | | | |
| 6. Employee's hire date Provide the employee's <i>current date of hire</i> . | | 7. Employee's current employment status | |
| <div style="border: 1px solid black; padding: 2px;"> / / <small style="margin-left: 20px;">month day year</small> </div> | | <input type="checkbox"/> Actively employed-not terminated <input type="checkbox"/> Terminated from employment (provide date below) Date Terminated <div style="border: 1px solid black; padding: 2px; margin-left: 20px;"> / / <small style="margin-left: 20px;">month day year</small> </div> | |
| 8. Last day worked before leave | | 9. Has the employee returned to work? | |
| <div style="border: 1px solid black; padding: 2px;"> / / <small style="margin-left: 20px;">month day year</small> </div> | | <input type="checkbox"/> Yes <input type="checkbox"/> No Return to work date: / / <small style="margin-left: 20px;">month day year</small> <div style="margin-left: 20px;"> <input type="checkbox"/> Actual <input type="checkbox"/> Estimated </div> | |
| 10. Colorado ("CO") employment verification | | | |
| a. Are the employee's earnings reported at year end on IRS form W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No (answer question 10b.) b. Is the employee subject to Unemployment Insurance obligations in CO? <input type="checkbox"/> Yes <input type="checkbox"/> No (answer question 10c.) c. Is the employee's service localized (performed entirely) within CO? <input type="checkbox"/> Yes <input type="checkbox"/> No (answer question 10d.) d. If services are not localized, is the employee's base of operations in CO, and some of the work is performed in CO? <div style="text-align: right; margin-right: 50px;"><input type="checkbox"/> Yes <input type="checkbox"/> No (answer question 10e.)</div> e. If there is no base of operations, does the employee perform some of the services within CO and receive direction and control from CO? <div style="text-align: right; margin-right: 50px;"><input type="checkbox"/> Yes <input type="checkbox"/> No (answer question 10f.)</div> f. If there is no place of direction and control, no localized services and no base of operations in CO, does the employee reside in CO? <div style="text-align: right; margin-right: 50px;"><input type="checkbox"/> Yes <input type="checkbox"/> No</div> | | | |

Form continues on next page

| | |
|------------------------------------|------------------------|
| Employee's Legal Name: | Employee's SSN: |
| Employee's Mailing Address: | |

Employer Information- Continued from previous page

| 11. Employee's job title | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|--------|-------|--------|-------|--------|-------|--------|-------|----------------|-------|---|-------------------|-------------------------------|------------|-----------|-------|-------|-----------|-------|-------|-----------|-------|-------|-----------|-------|-------|-------------------------|-------|-------|
| 12. Employee's normal working schedule and hours worked a. Select the days of the week the employee usually works and list the average number of work days per week. Average # of work days per work week: _____ <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun b. Provide the scheduled work hours from the last 4 weeks the employee reported to work prior to the last day worked before leave <table border="1" style="width:100%; border-collapse: collapse; margin-left: 20px;"> <thead> <tr> <th style="width:15%;">Week #</th> <th style="width:85%;">Scheduled Weekly Hours Worked (e.g. 40 hours)</th> </tr> </thead> <tbody> <tr><td>Week 1</td><td>_____</td></tr> <tr><td>Week 2</td><td>_____</td></tr> <tr><td>Week 3</td><td>_____</td></tr> <tr><td>Week 4</td><td>_____</td></tr> <tr><td>Average</td><td>_____</td></tr> </tbody> </table> | Week # | Scheduled Weekly Hours Worked (e.g. 40 hours) | Week 1 | _____ | Week 2 | _____ | Week 3 | _____ | Week 4 | _____ | Average | _____ | 13. Provide the employee's wages during the base period: <i>"Wages" include, but are not limited to, salary, wages, tips, commissions, and other compensation as determined by the director by rule.</i> <i>"Base period" means the first four of the last five completed calendar quarters immediately preceding the first day of the individual's benefit year.</i> <i>"Benefit Year" has the same meaning as application year as defined in C.R.S 8-13.3-503(1) and as described in C.R.S. 8-13.3-521(1)(b) means the 12-month period beginning on the first day of the calendar week in which an individual's benefit start date occurs.</i> <table border="1" style="width:100%; border-collapse: collapse; margin-left: 20px;"> <thead> <tr> <th style="width:25%;">Base period wages</th> <th style="width:30%;">Quarter Ending Date (mm/yyyy)</th> <th style="width:45%;">Wages (\$)</th> </tr> </thead> <tbody> <tr><td>Quarter 1</td><td>_____</td><td>_____</td></tr> <tr><td>Quarter 2</td><td>_____</td><td>_____</td></tr> <tr><td>Quarter 3</td><td>_____</td><td>_____</td></tr> <tr><td>Quarter 4</td><td>_____</td><td>_____</td></tr> <tr><td>Quarter 5 (most recent)</td><td>_____</td><td>_____</td></tr> </tbody> </table> | Base period wages | Quarter Ending Date (mm/yyyy) | Wages (\$) | Quarter 1 | _____ | _____ | Quarter 2 | _____ | _____ | Quarter 3 | _____ | _____ | Quarter 4 | _____ | _____ | Quarter 5 (most recent) | _____ | _____ |
| Week # | Scheduled Weekly Hours Worked (e.g. 40 hours) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Week 1 | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Week 2 | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Week 3 | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Week 4 | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Average | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Base period wages | Quarter Ending Date (mm/yyyy) | Wages (\$) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quarter 1 | _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quarter 2 | _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quarter 3 | _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quarter 4 | _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quarter 5 (most recent) | _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

14. Will Leave be Utilized Continuously or Intermittently or on a Reduced Leave Schedule? Provide Details Below. Any changes to your employee's leave plans and/or estimated dates must be communicated/confirmed as soon as possible to us.

| | | |
|---|---|--|
| <input type="checkbox"/> Continuous Leave: <i>continuous uninterrupted period of leave for a single qualifying reason.</i> | <u>Leave Start Date</u> <small>Enter the first date the EE is requesting continuous leave from work.</small> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 40px; height: 20px; display: inline-block;"></div> </div> | <u>Leave End Date</u> <small>Enter the last date the EE is requesting continuous leave through.</small> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 40px; height: 20px; display: inline-block;"></div> </div> |
| <input type="checkbox"/> Intermittent Leave: <i>Leave in separate, non-consecutive time periods rather than a single span of time for a single qualifying reason, Episodic time off</i> | <u>Leave Start Date</u> <small>Enter the first date the EE is requesting intermittent leave from work.</small> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 40px; height: 20px; display: inline-block;"></div> </div> | <u>List all dates/hours requested:</u> |
| <input type="checkbox"/> Reduced Leave Schedule: <i>A consistent but reduced work schedule for multiple weeks.</i> | <u>Leave Start Date</u> <small>Enter the first date the EE is requesting reduced leave from work.</small> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 40px; height: 20px; display: inline-block;"></div> </div> | <u>Frequency of leave:</u> (e.g., 2 days per week, or 4 hours per day, or every Monday) |

| | | |
|--|---|----------------|
| 16. Was 30 days advance notice given to you by the employee requesting foreseeable leave? | | |
| <input type="checkbox"/> Yes <input type="checkbox"/> No <div style="text-align: center;">↓</div> | <u>Date notice provided to employer</u> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></div> / <div style="border: 1px solid black; width: 40px; height: 20px; display: inline-block;"></div> </div> | <u>Detail:</u> |
| Will the employer waive the 30 day advance notice requirement for a foreseeable leave? <input type="checkbox"/> Yes <input type="checkbox"/> No | | |

Form continues on next page

| | |
|------------------------------------|------------------------|
| Employee's Legal Name: | Employee's SSN: |
| Employee's Mailing Address: | |

Employer Information - Continued from previous page

17. Has the employee received or claimed any of the following benefits in the preceding 52 weeks? Provide detail below, and any supporting documentation pertaining to the type of benefit received/claimed.

| | received | claimed | from <small>(mm/dd/yyyy)</small> | - | through <small>(mm/dd/yyyy)</small> |
|---|--------------------------|--------------------------|---|---|---|
| a. Unemployment benefits (CESA) | <input type="checkbox"/> | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | - | <input style="width: 100%;" type="text"/> |
| b. Workers' Compensation due to work-related injury/illness | <input type="checkbox"/> | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | - | <input style="width: 100%;" type="text"/> |
| c. CO PFML/FAMLI | <input type="checkbox"/> | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | - | <input style="width: 100%;" type="text"/> |
| d. Other (Sick/Vacation/PTO or other employer provided leave. Please specify. Attach a separate sheet if necessary) | <input type="checkbox"/> | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | - | <input style="width: 100%;" type="text"/> |

18. Employer-provided Paid Leave during leave period

An employee cannot receive both wage replacement benefits under the FAMLI Act and employer-provided paid leave for the same hours absent, except that pursuant to C.R.S. 8-13.3-510(1)(c), an employer and an employee may mutually agree that the employee may use any **accrued employer-provided leave** as a **supplement** to family and medical leave insurance benefits in an amount not to exceed the difference between the individual's wage replacement benefits under the FAMLI Act and the individual's average weekly wage.

"**Employer-provided paid leave**" means vacation leave, paid sick leave, paid personal leave, paid parental leave, paid leave under C.R.S. 24-34-402.7, and any other employer-paid time off, except that employer-provided paid leave does not include benefits under a commercial short-term or long-term disability policy for purposes of these rules.

a. Will the employee be using any employer-provided paid leave **during the leave period requested**?
 Yes (answer question b) **NO** (go to question # 19)

b. Will the employee be receiving wage replacement **during all or a portion of the leave period requested**?
 Yes – (answer question i and ii) **NO** (go to question # 19)

i. provide detail on type of wage replacement and the date(s) it will be paid for:

ii. are you requesting reimbursement* for advance payment of FAMLI benefits? **Yes** **No**

Note:
Employer reimbursement may be permitted if the employee's salary is being continued through some kinds of benefits payments made by the employer. Employer reimbursement is **not permitted** if the employee is using **any employer-provided paid leave** such as use of accrued vacation, sick, personal or parental leave.

19. CO PFML Policy #:

Attestation and Signature

NOTICE It is unlawful to knowingly provide false, incomplete, or misleading facts or information to an insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance, and civil damages.

I am the person authorized to sign as the employer of the employee requesting benefits under the Colorado Family and Medical Leave Insurance program. My signature affirms that to the best of my knowledge the information I have provided is true, accurate, and complete.

| | |
|--------------------------|---|
| Signature | Date (mm/dd/yyyy) <div style="text-align: center;"> <input style="width: 30px; height: 30px;" type="text"/> / <input style="width: 30px; height: 30px;" type="text"/> / <input style="width: 60px; height: 30px;" type="text"/> </div> <div style="text-align: center; font-size: small;"> month day year </div> |
|--------------------------|---|

End of CO PFML Employer Statement.

COLORADO SAFE LEAVE ATTESTATION FORM

Safe Leave allows a covered individual (“Claimant” or “employee” or “You”) to take leave from employment for any of the following purposes related to or resulting from domestic violence, sexual assault or abuse, harassment, or stalking:

- (a) Seeking a civil protection order to prevent domestic violence;
 - (b) Obtaining medical care or mental health counseling or both for you or your child(ren) to address physical or psychological injuries resulting from the act of domestic violence, stalking, or sexual assault or abuse;
 - (c) Making your home or the home of your family member secure from the perpetrator of the act of domestic violence, stalking, or sexual assault or abuse, or seeking new housing to escape said perpetrator; or
 - (d) Seeking legal assistance to address issues arising from the act of domestic violence, stalking, or sexual assault or abuse, or attending and preparing for court- related proceedings arising from said act or crime.
- “Domestic violence” means any conduct that constitutes “domestic violence” as set forth in C.R.S. § 18-6-800.3 (1) or § 14-10-124 (1.3)(a) or “domestic abuse” as set forth in § 13-14-101 (2).
 - “Stalking” means any act as described in C.R.S. § 18-3-602.
 - “Sexual assault or abuse” means any offense as described in C.R.S. § 16-11.7-102 (3), or sexual assault, as described in § 18-3-402, committed by any person against another person regardless of the relationship between the actor and the victim.

PRINT CLEARLY IN BLUE OR BLACK INK. Missing or incomplete information may delay processing.

Claimant Information (to be completed by the individual requesting Safe Leave)

1. Claimant’s Legal Name (First Name, Middle Initial, Last Name):

| | | |
|-------------------|-----------------------|------------------|
| <i>First name</i> | <i>Middle Initial</i> | <i>Last name</i> |
|-------------------|-----------------------|------------------|

2. Claimant’s Mailing Address (Street Address (including apt/fl #), City, State, Zip):

| |
|------------------------|
| <i>Street address</i> |
| <i>City, State Zip</i> |

3. Claimant’s Social Security Number or TIN: (9 digits)

| | | | | | | | | | |
|--|--|--|---|--|--|---|--|--|--|
| | | | - | | | - | | | |
|--|--|--|---|--|--|---|--|--|--|

4. Claimant’s Date of Birth:

| | | | | | | | | |
|--------------|--|---|------------|--|---|-------------|--|--|
| | | / | | | / | | | |
| <i>month</i> | | | <i>day</i> | | | <i>year</i> | | |

5. Claimant’s Gender

Male
 Female
 Not Designated/Other

6. Reason for Safe Leave Request: (one or more options may be selected).

| | |
|--------------------------|--|
| <input type="checkbox"/> | <p>Safe Leave to care for my child(ren)</p> <p>Select type of care provided:</p> <input type="checkbox"/> Seek medical care for my child(ren), (including counseling) for physical or psychological injury or disability or to aid in recovery from injuries caused by domestic violence, sexual assault, harassment, or stalking. <input type="checkbox"/> Obtain services for my child(ren) from a victim services provider <input type="checkbox"/> Relocate my child(ren) or take steps to secure an existing home <input type="checkbox"/> Participate in and/or support my child(ren) during civil, criminal, or administrative proceedings related to or resulting from the domestic violence, sexual assault, harassment, or stalking. |
| <input type="checkbox"/> | <p>Safe Leave for myself to seek medical care (including counseling) for physical or psychological injury or disability or to recover from injuries caused by domestic violence, sexual assault, harassment, or stalking</p> |
| <input type="checkbox"/> | <p>Safe Leave for myself or my family member to</p> <input type="checkbox"/> Obtain services from a victim services provider <input type="checkbox"/> Relocate or take steps to secure an existing home <input type="checkbox"/> Participate in civil, criminal, or administrative proceedings related to or resulting from the domestic violence, sexual assault, harassment, or stalking. |

Form continues on next page

Claimant Name: _____ Claimant SSN: - -

Claimant Address: _____

Safe Leave Required Documentation

Attestation and Signature

NOTICE: It is unlawful to knowingly provide false, incomplete, or misleading facts or information to an insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance, and civil damages.

I attest that I am in need of Safe Leave due to myself or my family member being the victim of domestic violence, stalking, or sexual assault or abuse. I am hereby making a request for benefits under Colorado Paid Family and Medical Leave Insurance. My signature affirms that the information I am providing is true and accurate to the best of my knowledge and belief.

Signature

Date Signed

/ /
month day year

Third Party Signature (if completed by third party)

I attest I am an Attorney, an Employee of the Judicial Branch's Office of the Victim Services or the Office of the Victim Advocate, or a licensed medical professional or other licensed professional. I am attesting that the above-named individual is a victim of domestic violence, harassment, sexual assault, or stalking.

Print Name

Organization Name

Signature

Date
Signe

/ /
month day year

End of CO PFML - Safe Leave Attestation form

INSTRUCTIONS

PLEASE PRINT ALL INFORMATION CLEARLY IN BLUE OR BLACK INK. This form must be fully completed, signed, and dated to be valid. Ineligible or incomplete submissions are unable to be processed and will not be accepted.

Eligibility for Direct Deposit: ShelterPoint Life Insurance Company (SPL) and ShelterPoint Insurance Company (SPI) (collectively, the "Companies" and each, a "Company") each offer direct deposit for statutory claim payments. A Company shall be legally recognized and deemed an active party to this agreement in jurisdictions where their involvement is required or legally recognized with all associated rights and obligations. Each Company is independent with respect to the other and is solely responsible for its own performance and neither Company shall have any authority to bind the other or incur obligations on the other's behalf.

Direct deposit, for statutory claim payments, is only available where benefit payments are being issued directly to a claimant/employee. Direct deposit is **not** available if statutory benefits are being issued to an Employer.

In the event that a direct deposit payment is rejected by a bank, the rejected payment and any future benefit payments due under the claim will be issued via check until the bank information is corrected and an updated Enrollment and Authorization Form is submitted.

Required information: You must supply all requested information on this form. Fully completed, signed and dated forms may be sent to ShelterPoint by any of the below listed methods:

- Upload your completed form via www.shelterpoint.com
- Email to: claimforms@shelterpoint.com
- Fax to: 516-504-6414
- Mail to: ShelterPoint, 1225 Franklin Avenue - Suite 475, Garden City NY 11530

If you have any questions regarding this form, contact our Customer Service Department at 1-800-365-4999.

Please allow up to 10 business days for set up of your direct deposit request.

REQUIRED INFORMATION (please print all information CLEARLY)

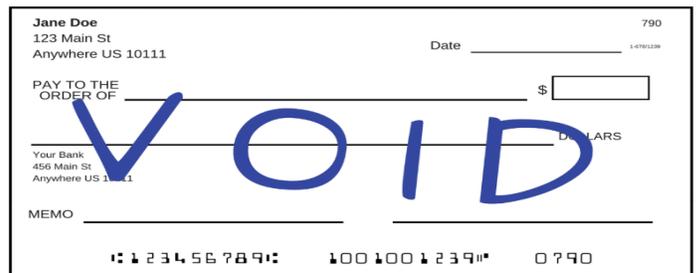
| | |
|---|---|
| 1. <u>Claimant Name (First name, Last name)</u> | 2. <u>Social Security Number or I-TIN</u> (9 digits) |
| 3. <u>ShelterPoint Life Claim Number(s)</u> | |
| 4. <u>Account Type:</u> <input type="checkbox"/> Checking Account <input type="checkbox"/> Savings Account | |

ATTACH PROOF OF BANK ACCOUNT INFORMATION

Examples of valid proof of banking include:

- A copy of a voided check with your name, address, bank name, routing number and account number listed; or
- A written statement from your bank confirming account holder name, address, bank name, routing number and account number

Failure to include proof of banking information will result in direct deposit not being established under an approved claim.



AUTHORIZATION AND SIGNATURE

I authorize the applicable Company to deposit any benefits I am eligible to receive directly into the bank and account indicated or to such other account as the bank or any successor bank designates as my account. I also authorize the applicable Company to debit my account for any deposits made in error, or the Company reserves the right to request the return of such funds through other mechanisms. I also understand that my successful direct deposit enrollment will stay in effect until I notify the Company, in writing, of cancellation or until I am no longer eligible for or due payments, whichever comes first. Lastly, should I become eligible for claim payments under multiple, separate and distinct claims, my successful enrollment shall apply to all approved claims.

Check this box if you **do not** want to receive paper EOBs in the mail if your direct deposit request is approved.

| | |
|---------------------------|--------------------------|
| Claimant Signature | Date (mm/dd/yyyy) |
|---------------------------|--------------------------|