

Checklist for Requesting Oregon Paid Family and Medical Leave (PFML)**Before you apply for benefits:**

- Check Eligibility Requirements For Leave.**
- Plan your leave.** Leave can be taken continuously, intermittently, or on a reduced leave schedule, in accordance with OR PFML. The minimum time increment is one (1) day.
- Notify your OR employer** at least 30 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 the CLAIMANT STATEMENT in its entirety.**
Sign and date the form, retain a copy for your files and give the claim package to your employer so they can complete the employer statement.
- Your OR Employer completes the EMPLOYER STATEMENT in full, makes a copy for their file and returns to you.**
- Complete the certification for your leave type (options on page 2) and attach supporting documentation.**

Submit your fully completed claim package to ShelterPoint or your employer's current OR PFML carrier:

Completed claims for OR 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 Insurance, 1225 Franklin Ave-Ste 475, Garden City NY 11530

Web address: www.shelterpoint.com

Phone #: 1-800-365-4999

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

A complete application for benefits must be submitted to us within 30 days prior to the 1st confirmed day of leave. 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 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 person who, with an intent to knowingly defraud or knowingly facilitate a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement of a material fact, may be guilty of insurance fraud.

Checklist for Requesting Oregon Paid Family and Medical Leave (OR PFML)**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; leave may not be requested for the same period of time.

- Bonding Leave With A New Child:** (birth, adoption or foster placement)
 - Complete the OR - BONDING CERTIFICATION form.
 - Attach documentation as listed on the form, supporting your relationship with the new child.

- Medical Leave Due To My Own Serious Health Condition** *(including pregnancy, organ or bone marrow donation)*
 - Complete the HIPAA Authorization form and provide it to your health care provider, allowing medical information to be shared with ShelterPoint.
 - Complete the top portion of the OR - MEDICAL CERTIFICATION – SELF CARE form.
 - Your health care provider completes the remainder of the OR - MEDICAL CERTIFICATION – SELF CARE form and returns the completed form to you.

- Caring For A Family Member With A Serious Health Condition**
 - Your family member completes the HIPAA Authorization form and provides it to their health care provider, allowing medical information to be shared with you and ShelterPoint.
 - Complete the top portion of the OR - MEDICAL CERTIFICATION – FAMILY CARE form, providing information on yourself and your qualifying family member requiring care.
 - Your family member's health care provider completes the remainder of the OR - MEDICAL CERTIFICATION – FAMILY CARE form and returns the completed form to them/you.

- Safe Leave**
 - Complete the OR – SAFE LEAVE CERTIFICATION form.
 - Attach proof documents supporting the leave (options listed on the form)

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.*

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

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 (Minimum increment 1 day)

Leave Start Date

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

[] [] / [] [] / [] [] [] []
month day year

Date(s) Requested:

Reduced Leave Schedule:

A consistent but reduced work schedule taken in one (1) day increments for multiple weeks.

Leave Start Date

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

[] [] / [] [] / [] [] [] []
month day year

Frequency of leave in one (1) day increments: (eg: 2 days per week, or every Monday)

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 within 24 hours of the start of leave, and written notice within 3 days after the leave begins.

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	<input type="checkbox"/>	<input type="checkbox"/>	[] [] [] []	[] [] [] []
b. Workers' Compensation	<input type="checkbox"/>	<input type="checkbox"/>	[] [] [] []	[] [] [] []
c. Oregon Family Leave Act (OFLA)	<input type="checkbox"/>	<input type="checkbox"/>	[] [] [] []	[] [] [] []
d. OR PFMLI/Paid Leave Oregon	<input type="checkbox"/>	<input type="checkbox"/>	[] [] [] []	[] [] [] []

Form continues on next page

Claimant Name: _____ Claimant SSN: --

Claimant Address: _____

Employment Information

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

KEY TERMS:

Benefit year: period of 52 consecutive weeks beginning on the Sunday immediately preceding the day that OR PFML begins.

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

Wages: Includes but not limited to: commission or a guaranteed wage, compensatory pay, bonuses, vacation/PTO/sick/holiday pay, tips & gratuities, dismissal or separation allowances.

Wages does not include: expense reimbursement for meals/travel, pensions, jury pay, gifts other than tips/gratuities, benefits paid through a cafeteria plan.

Example: Jada requests OR PFML for bonding leave with a leave start date of 9/20/2023. Her benefit year will begin on 9/17/2023, which is the Sunday prior to the start of leave on 9/20/2023. Jada's base year for reporting wages is the **first (4)** of the **previous (5) completed quarters**. Based on her start date, the lookback quarters are 1. 4/1 – 6/30/22 2. 7/1 – 9/30/22 3. 10/1 – 12/31/22 4. 1/1 – 3/31/23 5. 4/1 – 6/30/23. The gross wages from these first 4 quarters (4/1/2022 – 3/31/2023) will be used to determine her average weekly wage. Jada's gross wages during that time period was \$39,000 making her base weekly earnings \$750. This amount will be used to calculate her weekly benefit rate under OR PFML.

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

If you had more than one employer in the base year (the first four of the last five completed calendar quarters preceding the benefit year), name all employers. Wages is your sum total of gross (pre-tax) wages in the first 4 of the last 5 quarters prior to your application for leave, for that employer. Wages should only reflect wages earned in OR employment. Average hours and days worked per week is based off your Regular Work Schedule, averaged from the 12 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>	Days of the Week usually worked:	Gross (\$) Wages in Base Year
			<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 OR Employer(s)

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>	Days of the Week usually worked:	Gross (\$) Wages in Base Year
			<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	
			<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	

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

14. Consent to Obtain Wages From all OR Employers:

Only complete this question if you had more than one (1) OR employer during the base year.

If you have had more than one OR employer in the base year, do we have your consent to contact the Oregon Employment Department (OED) to obtain all wages reported in the base year, including from your other employer(s)?

Yes, I consent. No, I do not consent.

Print Name: _____

Signature: _____

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 types of leave, will be provided to the employer.

15. 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 may be 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

Declaration and Signature:

WARNING: Any person who, with an intent to knowingly defraud or knowingly facilitate a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement of a material fact, may be guilty of insurance fraud. I further certify 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 Oregon 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

	/		/			
<small>month</small>		<small>day</small>		<small>year</small>		

End of OR PFML - Claimant Statement.

Claimant's Legal Name:	Claimant's SSN: <input type="text"/> - <input type="text"/> - <input type="text"/>
Claimant's Mailing Address:	

Employer Information - Continued from previous page
11. Employee's Job Title:

12. Employee's Normal Working Schedule & Hours Worked: a. Select the days of the week the employee usually works and list the average number of work days per 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 Average # of work days per work week: _____ b. Provide the scheduled work hours from the last 12 weeks the employee reported to work prior to the last day worked before leave <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:15%;">Week #</th> <th style="width:85%;">Scheduled Weekly Hours (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>Week 5</td><td></td></tr> <tr><td>Week 6</td><td></td></tr> <tr><td>Week 7</td><td></td></tr> <tr><td>Week 8</td><td></td></tr> <tr><td>Week 9</td><td></td></tr> <tr><td>Week 10</td><td></td></tr> <tr><td>Week 11</td><td></td></tr> <tr><td>Week 12</td><td></td></tr> <tr> <td style="text-align: right;">Average</td> <td></td> </tr> </tbody> </table>	Week #	Scheduled Weekly Hours (e.g. 40 hours)	Week 1		Week 2		Week 3		Week 4		Week 5		Week 6		Week 7		Week 8		Week 9		Week 10		Week 11		Week 12		Average		13. Provide the Employee's Wages During the Base Year: <i>"Wages" includes but is not limited to: commission or a guaranteed wage, compensatory pay, bonuses, vacation/PTO/sick/holiday pay, tips & gratuities, dismissal or separation allowances.</i> <i>"Base year" 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" means the period of 52 consecutive weeks beginning on the Sunday immediately preceding the day that OR PFML begins</i> Example: Jada requests OR PFML for bonding leave with a leave start date of 9/20/2023 . Her benefit year will begin on 9/17/2023, which is the Sunday prior to the start of leave on 9/20/2023. Jada's base year for reporting wages is the first (4) of the previous (5) completed quarters . Based on her start date, the lookback quarters are 1. 4/1 – 6/30/22 2. 7/1 – 9/30/22 3. 10/1 – 12/31/22 4. 1/1 – 3/31/23 5. 4/1 – 6/30/23. The gross wages from these first 4 quarters (4/1/2022 – 3/31/2023) will be used to determine her average weekly wage. Jada's gross wages during that time period was \$39,000 making her base weekly earnings \$750. This amount will be used to calculate her weekly benefit rate under OR PFML. <table border="1" style="width:100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width:10%;"></th> <th style="width:30%;">Base year wages</th> <th style="width:20%;">Quarter Ending Date (mm/yyyy)</th> <th style="width:40%;">Wages (\$)</th> </tr> </thead> <tbody> <tr> <td rowspan="5" style="text-align: center; vertical-align: middle;">base year</td> <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 year wages	Quarter Ending Date (mm/yyyy)	Wages (\$)	base year	Quarter 1			Quarter 2			Quarter 3			Quarter 4			Quarter 5 (most recent)		
Week #	Scheduled Weekly Hours (e.g. 40 hours)																																																
Week 1																																																	
Week 2																																																	
Week 3																																																	
Week 4																																																	
Week 5																																																	
Week 6																																																	
Week 7																																																	
Week 8																																																	
Week 9																																																	
Week 10																																																	
Week 11																																																	
Week 12																																																	
Average																																																	
	Base year wages	Quarter Ending Date (mm/yyyy)	Wages (\$)																																														
base year	Quarter 1																																																
	Quarter 2																																																
	Quarter 3																																																
	Quarter 4																																																
	Quarter 5 (most recent)																																																

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

<input type="checkbox"/> Continuous Leave: <i>continuous uninterrupted period of leave for a single qualifying reason.</i>	<table style="width:100%;"> <tr> <td style="width:50%; text-align: center;"> <u>Leave Start Date</u> <small>Enter the first date the EE is requesting continuous leave from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/> </td> <td style="width:50%; text-align: center;"> <u>Leave End Date</u> <small>Enter the last date the EE is requesting continuous leave through.</small> <input type="text"/> / <input type="text"/> / <input type="text"/> </td> </tr> <tr> <td style="text-align: center;">month / day / year</td> <td style="text-align: center;">month / day / year</td> </tr> </table>	<u>Leave Start Date</u> <small>Enter the first date the EE is requesting continuous leave from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/>	<u>Leave End Date</u> <small>Enter the last date the EE is requesting continuous leave through.</small> <input type="text"/> / <input type="text"/> / <input type="text"/>	month / day / year	month / day / year
<u>Leave Start Date</u> <small>Enter the first date the EE is requesting continuous leave from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/>	<u>Leave End Date</u> <small>Enter the last date the EE is requesting continuous leave through.</small> <input type="text"/> / <input type="text"/> / <input type="text"/>				
month / day / year	month / day / year				
<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. Minimum increment is (1) day.</i>	<table style="width:100%;"> <tr> <td style="width:50%; text-align: center;"> <u>Leave Start Date</u> <small>Enter the first date the EE is requesting INTERMITTENT leave from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/> </td> <td style="width:50%; text-align: center;"> <u>Date(s) Requested:</u> </td> </tr> <tr> <td style="text-align: center;">month / day / year</td> <td></td> </tr> </table>	<u>Leave Start Date</u> <small>Enter the first date the EE is requesting INTERMITTENT leave from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/>	<u>Date(s) Requested:</u>	month / day / year	
<u>Leave Start Date</u> <small>Enter the first date the EE is requesting INTERMITTENT leave from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/>	<u>Date(s) Requested:</u>				
month / day / year					
<input type="checkbox"/> Reduced Leave Schedule: <i>A consistent but reduced work schedule taken in one (1) day increments for multiple weeks.</i>	<table style="width:100%;"> <tr> <td style="width:50%; text-align: center;"> <u>Leave Start Date</u> <small>Enter the first date the EE is requesting REDUCED LEAVE from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/> </td> <td style="width:50%; text-align: center;"> <u>Frequency of Leave in one (1) day increments:</u> (e.g. 2 days per week or every Monday) </td> </tr> <tr> <td style="text-align: center;">month / day / year</td> <td></td> </tr> </table>	<u>Leave Start Date</u> <small>Enter the first date the EE is requesting REDUCED LEAVE from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/>	<u>Frequency of Leave in one (1) day increments:</u> (e.g. 2 days per week or every Monday)	month / day / year	
<u>Leave Start Date</u> <small>Enter the first date the EE is requesting REDUCED LEAVE from work.</small> <input type="text"/> / <input type="text"/> / <input type="text"/>	<u>Frequency of Leave in one (1) day increments:</u> (e.g. 2 days per week or every Monday)				
month / day / year					

Form continues on next page

Claimant's Legal Name:	Claimant's SSN: <input type="text"/> - <input type="text"/> - <input type="text"/>
Claimant's Mailing Address:	

Employer Information - Continued from previous page

15. Notice to Employer
 Foreseeable leave (a qualifying event such as a planned medical procedure/treatment for the claimant or their qualified family member, or for the birth of/placement of a new child) requires advance notice to the employer. Unforeseeable leave (emergency basis or unexpected) requires notice to the employer within 24 hours of the start of leave, and written notice within 3 days after the leave begins.

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

b. Date notice was provided to employer: / /
month day year

c. Will employer waive the 30 day advance notice requirement for foreseeable leave? Yes No

16. 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	<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. Oregon Family Leave Act (OFLA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	-	<input type="text"/>
d. OR PFMLI/Paid Leave Oregon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	-	<input type="text"/>

17. Employer - Provided Paid Leave During Leave Period:

Family and medical leave insurance benefits are in addition to any paid sick time under ORS 653.606, vacation leave or other paid leave earned by an employee. An employer may permit an employee to use paid sick time, vacation leave or any other paid leave earned by the employee in addition to receiving paid family and medical leave insurance benefits to replace an employee's wages.

a. Will the employee be using any employer-provided paid leave **during the leave period requested?**

Yes (answer question b) NO (go to question # 18)

b. Will the employee be receiving **wage replacement** (e.g. salary continuation) **during all or a portion of the leave period requested?**

Yes – (answer question i and ii) NO (go to question # 18)

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 OR PFML benefits? Yes No

18. Employee Contributions:

ShelterPoint will rely on and use the information you provide in response to these questions to (1) determine the amount of tax, if any, it is required to withhold from any claim payments and (2) determine the amount it is required to report on applicable tax forms, if any, that it has agreed to file.

a. Does the employee contribute to the cost of OR Paid Medical leave (PFML) coverage? Yes No

Answer I and II. below Skip a.I and II and go to question 19.

I. If yes, what percentage of the overall OR PFML premium does the employee pay towards the MEDICAL LEAVE portion of PFML? _____%

If left blank, we will assume the employee contributes the maximum allowable.

II. What percentage of the overall OR PFML premium does the employee pay towards the FAMILY LEAVE portion of PFML? _____%

If left blank, we will assume the employee contributes the maximum allowable.

Form continues on next page

Claimant's Legal Name:	Claimant's SSN: <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Claimant's Mailing Address:	

Employer Information - Continued from previous page

19. OR PFML Policy #:

Declaration and Signature

WARNING: Any person who, with an intent to knowingly defraud or knowingly facilitate a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement of a material fact, may be guilty of insurance fraud.

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

Signature	Date Signed <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <small>month day year</small>
------------------	--

End of OR- PFML Employer Statement.

Claim Number: _____

OREGON BONDING LEAVE CERTIFICATION

Bonding Leave allows an eligible individual to take leave from employment to care for and bond with a child during the first year of the child's birth or placement. An individual may not exceed 12 weeks of paid leave per child for the purpose of caring for and bonding with the child during the first year of the birth or initial placement of the child, regardless if a new benefit year starts during the first year following birth or initial placement. 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. 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.

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

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 TIN: (9 digits)

			-					
--	--	--	---	--	--	--	--	--

4. Claimant's Date of Birth:

		/			/				
month			day			year			

5. Claimant's Gender:

- Male
- Female
- Not Designated/Other

Bonding Information for New Child

1. Child's ACTUAL Date of Birth:

		/			/				
month			day			year			

2. Relationship of Child to Claimant Requesting Leave:

- Biological child
- Foster child
- Adopted child

2a. Placement Date for Adopted/Foster Child:

If requesting leave to bond with an adopted or foster child, provide the DATE the child was placed with you.

Placement Date:

		/			/				
month			day			year			

3. Bonding Leave required Documentation:

Please include at least one (1) of the below documents with this application to support the request for leave. Your claim cannot be accepted without proof documentation supporting the leave.

NOTE: The proof document(s) provided **must** show the claimant's first and last name as parent or guardian of the child after birth or placement of the child through foster care or adoption, and include the child's first and last name and date of the child's birth or placement.

Birth of Child:

- Child's Birth Certificate
- Consular Report of Birth Abroad;
- A document issued by a Health Care Provider of the Child or pregnant Parent
- A hospital admission form associated with delivery

Adoption/Foster Care:

- A copy of a court order verifying placement;
- A letter signed by the attorney representing the prospective foster or adoptive parent that confirms the placement;
- A document from the foster care, adoption agency, or social worker involved in the placement that confirms the placement;
- A document for the child issued by the United States Citizenship and Immigration Services

Declaration and Signature

WARNING: Any person who, with an intent to knowingly defraud or knowingly facilitate a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement of a material fact, may be guilty of insurance fraud. I further certify 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 Oregon 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			

End of OR PFML Bonding Certification 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)

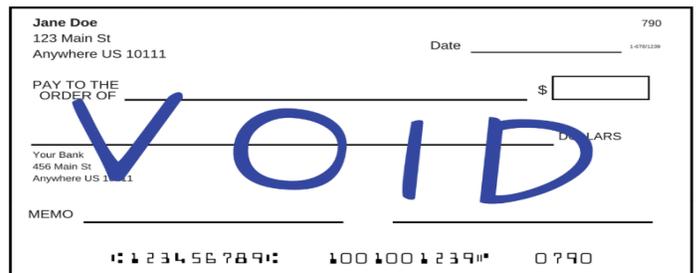
1. <u>Claimant Name (First name, Last name)</u>	2. <u>Social Security Number or I-TIN</u> (9 digits)
3. <u>ShelterPoint Life Claim Number(s)</u>	
4. <u>Account Type:</u> <input type="checkbox"/> Checking Account <input type="checkbox"/> Savings Account	

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)
---------------------------	--------------------------