

The Standard®

The Standard Life Insurance Company of New York 833.786.5638 Tel 866.752.4037 Fax PO Box 4160 Portland OR 97208

State University of New York Applying For Paid Family Leave

To Use Paid Family Leave To:

10 Ose I ulu I ulliny Leuve 10.
Bond with a newborn, a newly adopted or fostered child
Complete Form PFL-1 ☐ Complete PFL-1, Part A ☐ Provide PFL-1 to employer ☐ Employer completes PFL-1, Part B and returns to you within 3 days
Complete Form PFL-2 ☐ Complete PFL-2 and collect required documentation
Send forms and documents ☐ Send completed forms and required documentation to The Standard ☐ The Standard accepts or denies claim within 18 days
Care for a family member with a serious health condition
Complete Form PFL-1 □ Complete PFL-1, Part A □ Provide PFL-1 to employer □ Employer completes PFL-1, Part B and returns to you within 3 days
Complete Form PFL-3 □ Care recipient completes PFL-3 and provides to health care provider □ Care recipient's health care provider keeps PFL-3
Complete Form PFL-4 ☐ Complete "Employee" information at the top of PFL-4 ☐ Provide PFL-4 to care recipient's health care provider ☐ Care recipient's health care provider completes PFL-4 and returns to you
Send forms and documents ☐ Send completed forms and required documentation to The Standard ☐ The Standard accepts or denies claim within 18 days
Assist family members due to another family member's active military duty or impending active duty abroad
Complete Form PFL-1 ☐ Complete PFL-1, Part A ☐ Provide PFL-1 to employer ☐ Employer completes PFL-1, Part B and returns to you within 3 days
Complete Form PFL-5 ☐ Complete PFL-5 and collect required documentation
Send forms and documents ☐ Send completed forms and required documentation to The Standard

☐ The Standard accepts or denies claim within 18 days

State University of New York Request For Paid Family Leave (Form PFL-1) Instructions

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- To request PFL, the employee requesting PFL must complete Part A of the Request For Paid Family Leave (Form PFL-1). All items on the form are required unless noted as optional. The employee then provides the form to the employer to complete Part B.
- The employer completes Part B of the Request For Paid Family Leave (Form PFL-1) and returns it to the employee within three days.
- Additional forms are required depending on the type of leave being requested. The employee requesting leave is responsible for the completion of these forms.
- The employee submits the completed Request For Paid Family Leave (Form PFL-1) with the required additional form to The Standard listed on Part B of Request For Paid Family Leave (Form PFL-1). The employee should retain a copy of each submitted form for their records.

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

The employee requesting PFL must complete all required information.

Paid Family Leave (PFL) Request (to be completed by the employee)

Question 12: 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 13: 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 uncertain, estimate the start and end dates and indicate "Dates are estimated". If dates are "Periodic", enter the dates PFL will be taken. Please be as specific as possible. If the dates are unknown or estimated, indicate "Dates are estimated".

If dates are estimated, The Standard will 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 14: If the employee is submitting the 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 legal name and their date of birth at the top of the attachment.

Employment Information (to be completed by the employee)

Question 16: Enter the date of hire to the best of the employee's recollection. If it has been more than a year since the date of hire, entering the year in which employment started is sufficient.

Question 18: Enter the best estimate of average gross weekly wage. Include only the wages earned from the employer listed on this request form. The gross weekly wage is the total weekly pay - including overtime, tips, bonuses and commissions - before any deductions are made by the employer, such as federal and state taxes. If the employer is not able to supply this information, the employee can calculate their gross weekly wage as follows:

- **Step 1:** Add all gross wages received (<u>before</u> 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.

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

Please note that the employer is also required to provide this information in Part B of the Request For Paid Family Leave (Form PFL-1).

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	<u>+ \$550</u>				
Total =	\$4,200				
Divide by 8	<u>÷ 8</u>				
Average Weekly Wage =	\$525				
Bonus earned in preceding 52 weeks	\$2,600				
Divide by 52	<u>÷ 52</u>				
Prorated Weekly Bonus =	\$50				
Average Weekly Wage	\$525				
Prorated Weekly Bonus	<u>+ \$50</u>				
Average Weekly Wage (including bonus) =	\$575				

If you are pre-submitting form: Indicate if the employee is pre-submitting their PFL request. Pre-submitting is defined as submitting the application in advance of an upcoming qualifying event, with certain required information missing due to the information being unknown at the time of the submitting. If pre-submitting is permitted by The Standard, the missing information must be supplied as soon as it is known. Benefits cannot be determined until all of the required information is provided.

The Standard will provide the employee a notice within five days which 1) states the claim is pending; 2) identifies what information is missing; 3) instructs how to submit the missing information. **Once all information is supplied, The Standard has 18 days to pay or deny the claim.**

If The Standard does not permit pre-submitting, The Standard must return the Request for Paid Family Leave within five days to the employee with an explanation that the claim should be re-submitted when all information is available.

Employee signs and dates, before giving this form to their employer to complete Part B.

State University of New York Request For Paid Family Leave (Form PFL-1) Instructions

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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 2: If a Social Security Number is used for the Federal Employer Identification Number (FEIN), enter the Social Security Number.

Question 3: Enter the employer's Standard Industrial Classification (SIC) Code. Contact your carrier if you don't know your SIC code.

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

Question 9: 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, plus the weekly prorated amount of any bonus or commission received during the preceding 52 weeks. (For detailed steps, see chart on page 2 of the instructions.) 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 (<u>before</u> 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.

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

Be sure to complete the appropriate additional PFL form(s) based on the type of PFL leave being requested.

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.

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State University of New York Request For Paid Family Leave (Form PFL-1)

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

1. Employee's legal name (first name, middle initial, last name	2. Other last names, if a	any, unde	r which employ	ee has worked	
3. Employee's mailing address Street	City		State	Zip Code	Country (if not USA)
4. Employee's Social Security Number or TIN 5. Employ	6. Empl	oyee's primary)	telephone number		
7. Employee's preferred email address while on PFL (if availa	able)			oyee's gender E	□x
9. Employee's preferred language					
☐ English ☐ Español ☐ Russian ☐ Polski ☐	☐ Chinese ☐	Italiano Haitian	∐ Kore	an U Othe	r
Optional (for research purposes)					
10. Employee's ethnicity/race					
For purposes of health demographic only. (U.S. Centers	for Disease Co	entrol and Prevention (CD	C) code s	et, version 1.0.)
Is employee of Hispanic, Latino/a, or Spanish origin? (One or more categories may be selected.)		What is employee's r. (One or more categor		pe selected.)	
☐ Mexican		American Indian	or Alaska	Native	
☐ Mexican American		☐ Black or African A	American		
☐ Chicano/a		Asian Indian			
☐ Puerto Rican		☐ Chinese			
☐ Dominican		Filipino			
☐ Cuban		☐ Japanese			
		☐ Korean			
☐ Another Hispanic, Latino/a, or Spanish origin		☐ Vietnamese			
☐ Not of Hispanic, Latino/a, or Spanish origin		Other Asian			
∐ Unknown		☐ White			
		☐ Native Hawaiian			
		☐ Guamanian or Ch	amorro		
		☐ Samoan			
		Other Pacific Islan	nder		
		Other race			
PAID FAMILY LEAVE (PFL) REQUEST (to	be comple	eted by the employ	yee)		
11. Reason for PFL request: Bond with child	Care for family	member	y qualifyir	ng event	
12. The family member is employee's: Child Grandparent	☐ Spouse ☐ Grandcl		ner [Parent	☐ Parent-in-law

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State University of New York Request For Paid Family Leave (Form PFL-1)

TO BE COMPLETED BY THE EMPLOYEE					
Employee's legal name (first name, middle initial, last nam	e)			Employee's date of	birth (MM/DD/YYYY)
PART A - EMPLOYEE INFORMATION	(to be comple	ted by t	he e	mployee)	
13. Will PFL be for a continuous period of time and/or per	iodic?				
Continuous / / PFL start date (MM/DD/YYYY) PF	///			ates are estimated	
PFL start date (MM/DD/YYYY) PF	L end date (MM/DD/YY)	YY)			
Identify dates periodic PFL will be taken:					
Periodic					
					Dates are estimated
14. If providing less than 30 day's advance notice to the e	mployer, please expla	ain:			
Employment Information (to be completed	by the employee)			
15. Business legal name			16. Employee's date of hire (MM/DD/YYYY)		
17. Employee's work location Street address					
City			State	Zip code	Country (if not U.S.A.)
				, , , , ,	, , ,
18. Employee's average gross <u>weekly</u> wage (This data will	be requested of both	n employee	and e	mployer)	
19. Employer's telephone number for contact regarding th	is request	20a. Doe	s empl	oyee have more than o	one employer?
()		☐ Yes	□ No		
20b. If yes, is employee taking PFL from the other employ			y receiv	ving Workers' Compen	sation Lost Wage Benefits?
Yes No Disclosure statement: Information regarding PFL b	enefits received by		ovee s	such as payments re	ceived and types of leave
will be provided to the employer.				addir do paymonto re	contou and types of leave,
Declaration and signature					
Any person who knowingly and with intent to defrai					
statement of claim containing any materially false in fact material thereto, commits a fraudulent insurance					
five thousand dollars and the stated value of the cla				•	, ,
I am hereby making a request for paid family leave to information I am providing is true and accurate to the					y signature affirms that the
Employee's signature				signed (MM/DD/YYYY	<u> </u>
h - 22				5	,
☐ I am submitting this form in advance (see instructions	about pre-submitting	g). I unders	tand th	ne insurance carrier wil	I contact me to advise how to

submit the required missing information.

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State University of New York Request For Paid Family Leave (Form PFL-1)

Employee's date of birth (MM/DD/YYYY)

TO	BE	COMPL	ETED	BY	THE	EMPL	OYEE
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Employee's legal name (first name, middle initial, last name)

PA	RT B - I	EMPLOYER INFO	RMAT	ION (to be com	pleted	by the	employ	er)	
	Business's full legal name and mailing address State University of New York								Agency code 28
Ca	Campus Name				Mailing	address		'	
City	City				State		Zip code		Country (if not U.S.A.)
	mployer's 4-601320				Employ N	ee ID#			
	Employer's : 8 221	Standard Industrial Classific	cation (SI	C) Code	4. Emp	oyer's con	tact name f	or question	ns related to PFL
5. E	Employer's (contact telephone number	6. Emplo	oyer's contact email add	lress			7. Employ	yee's date of hire (MM/DD/YYYY)
8. E	Employee's	occupation – Codes are av	ailable at:	https://www.bls.gov/so	c/home.l	ntm			
9. [Enter the las	st 8 weeks of gross wages t	or the em	ployee and calculate the	e average	e gross wee	ekly wage		
	Week no.	Week ending date (MM/DI	D/YYYY)	Number of days wo	rked	Gro	ss amount	paid	Check Days Normally Worked
	1								☐ Monday
	2								☐ Tuesday
	3								Wednesday
									☐ Thursday
	4								Friday
	5								Saturday
	6								- Sunday
	7								
	8								
C	Calculated a	verage gross <u>weekly</u> wage:							
		oloyees are paid bi-weekly, d #1 an employee receives						eekly gros	s paid amount
	lease note t ny question		oyees you	u will need to report the	full comp	ensation w	eekly earni	ngs, please	e connect with SUNY if you have
9a.	9a. Through what date will the employee receive full wages?								
9b.	Through	what day will the employee	s work ob	oligations extend?					
9c.	9c. Will you be using Paid Parental Leave? If so, please provide the dates:								

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State University of New York Request For Paid Family Leave (Form PFL-1)

TO	BE	COMPL	ETED I	BY THE	EMPLO	YEE
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Employee's legal name (first name, middle initial, last name)	Employee's date of birth (MM/DD/YYYY)		
PART B - EMPLOYER INFORMATION (to be co	ompleted by th	ne employer)	
10. Is the employee taking Family Medical Leave Act (FMLA) concurren	itly with PFL?	∕es □ No	
11. PFL insurance carrier's name and mailing address PFL insurance	ce carrier's name		
The Standa	ard Life Insurance	e Company of Ne	w York
Mailing address PO Box 4160			
City Portland	State OR	Zip code 97208	Country (if not U.S.A.)
12. PFL insurance carrier's telephone number (800) 368-2859			
Declaration and signature	<u>'</u>		
\Box I affirm that this employee meets the PFL eligibility requ	irements for unc	lassified professi	onal employees.
\Box I affirm that this employee meets the PFL eligibility requ	irements for unc	lassified academ	ic employees.
Any person who knowingly and with intent to defraud any insur statement of claim containing any materially false information, of fact material thereto, commits a fraudulent insurance act, which five thousand dollars and the stated value of the claim for each	or conceals for the	purpose of mislea	ading, information concerning any
I am the person authorized to sign as the employer of the emp knowledge and belief, the information I have provided is true a		PFL. My signature	affirms that to the best of my
Employer's authorized signature		Date signed (MM/DD	0/YYYY)
Title	L		

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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 the *Military Qualifying Event (Form PFL-5)* with the *Request For Paid Family Leave (Form PFL-1)*.

The employee 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.

MILITARY QUALIFYING EVENT (to be completed by the employee)

The employee requesting PFL must complete all applicable requested information.

Employee enters their legal name, date of birth, other last names, if any, under which they have worked, Social Security or Taxpayer Identification Number (TIN) number, and mailing address at the top of page 1.

Employee enters their legal name and date of birth at the top of page 2.

Questions 1-5: Enter the military member's information, and indicate the military member's relationship to the employee.

Question 5: 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 6: Enter dates of expected military covered active duty.

Question 7: 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.

Qualifying Reason for Leave (to be completed by the employee)

Question 8: Explain the need for PFL because of the Military Qualifying Event. For example: "My spouse was just called on short notice to covered active duty status, and will be deployed to (country) in five days. I need to take PFL to be with them and make arrangements for while they are away on active duty." 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, date of birth, other last names, if any, under which they have worked, Social Security or Taxpayer Identification Number (TIN) number, and mailing address at the top of the attachment.

Question 9: Include one or more of the required 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.

State University of New York Military Qualifying Event (Form PFL-5)

The Standard Life Insurance Company of New York

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TO	ΒE	COMPL	ETED.	BY	THE	EMP	LOYEE

Employee's legal name (first name, middle initial, last name)		Employee's date of birth (MIM/DD/YYYY)			
Other last names, if any, under which employee has worked		Employee's Socia	al Security Number or TIN		
Employee's mailing address		I			
City	State	Zip Code	Country (if not U.S.A.)		
MILITARY QUALIFYING EVENT (to be comple	•				
 Name of military member on covered active duty or impending call t initial, last name) 	to covered active dut	y status (internatio	nal deployment) (first name, middle		
2. Military member's date of birth (MM/DD/YYYY)		member's gender			
4. Military member's mailing address					
City	State	Zip Code	Country (if not U.S.A.)		
☐ Spouse ☐ Domestic partner ☐ Child ☐ Parent	•	to	tive duty (MM/DD/YYYY)		
7. Please select one of the following and attach the indicated document call or order to covered active duty status:	t to support that the n	nilitary member is o	on covered active duty or impending		
☐ Covered active duty orders ☐ Letter of impending call or order	to covered duty		f military leave signed by the approving ary member's Rest and Recuperation		
Qualifying Reason For Leave (to be completed by the	e employee)				
8. What is the reason employee is requesting PFL? (One or more reason	ns may be selected.)				
	er's representative bef	ore a federal, state,	or local agency for purpose of		
☐ Arranging for parental care obtaining, arranging, or a	appealing military serv	ice benefits			
☐ Counseling ☐ Attending any event spor	nsored by the military	or military service o	organizations		
☐ Making financial arrangements ☐ Other					
☐ Making legal arrangements					

State University of New York Military Qualifying Event (Form PFL-5)

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TO BE COMPLETED BY THE EMPLOYEE	
Employee's legal name (first name, middle initial, last name)	Employee's date of birth (MM/DD/YYYY)
MILITARY QUALIFYING EVENT (to be completed	l by the employee)
9. Written documentation supporting this request for leave is available and	attached?
☐ Yes ☐ No ☐ None Available	
Note: A complete and sufficient certification to support a request for PFI documentation which supports the need for leave; such documentation is briefings sponsored by the military; a document confirming the military in appointment with a third party, such as a counselor or school official, or of legal or financial affairs. If leave is requested to meet with a third party meeting that includes the name, address, appropriate contact informatio telephone number, fax number, or email address of the individual or entit	may include a copy of a meeting announcement for informational nember's Rest and Recuperation leave; a document confirming an staff at a care facility; or a copy of a bill for services for the handling r, the employee must provide the supporting documentation of the on of the individual or entity with whom you are meeting (i.e., either
Declaration and signature	
Any person who knowingly and with intent to defraud any insurance of statement of claim containing any materially false information, or confact material thereto, commits a fraudulent insurance act, which is a five thousand dollars and the stated value of the claim for each such	nceals for the purpose of misleading, information concerning any crime, and shall also be subject to a civil penalty not to exceed
I am hereby making a request for paid family leave benefits under the information I am providing is true and accurate to the best of my kno	
Employee's signature	Date signed (MM/DD/YYYY)

State University of New York Military Qualifying Event (Form PFL-5)

The Standard Life Insurance Company of New York

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TO RE	COMPI	FTFD	RV THE	EMPLOYEE

TO BE COME EETED BY THE EMILECTEE				
Employee's legal name (first name, middle initial, last name)		Employee's da	Employee's date of birth (MM/DD/YYYY)	
Other last names, if any, under which employee has worked		Employee's So	Employee's Social Security Number or TIN	
Employee's mailing address				
City	State	Zip Code	Country (if not U.S.A.)	
QUALIFYING REASON FOR LEAVE - DOCUMENTATION				
If leave is requested to meet with a third party, the employee must provide supporting documentation of the meeting that includes 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 n	neeting/event.			
Name of individual with whom employee is meeting		Title	Title	
Organization Telephone (e number (provide area)	or country code) Fa	x number (provide area or country code)	
Email address				
Mailing address				
City	State	Zip Code	Country (if not U.S.A.)	
Describe nature of meeting. Include dates, if known:				