

Standard Insurance Company 866.756.8116 Tel 866.751.5174 Fax PO Box 3877 Portland OR 97208

Applying For Oregon Paid Family And Medical Leave (OR PFML)

To Use Oregon Paid Family And Medical Leave To: Bond with a newborn, a newly adopted or fostered child

| Complete Form OR PFML-1 |
|--|
| ☐ Complete OR PFML-1, Part A |
| ☐ Provide OR PFML-1 to employer |
| ☐ Employer completes OR PFML-1, Part B and returns to you within 3 days |
| Complete Form OR PFML-2 |
| ☐ Complete OR PFML-2 and collect supporting documentation |
| Send forms and documents |
| \square Send completed forms and supporting documentation to The Standard |
| Note: The Standard accepts or denies claim within 14 days once a complete claim is received. |
| |

Please keep a copy of all pages for your records.

Request For Oregon Paid Family And Medical Leave (Form OR PFML-1) Instructions

866.756.8116 Tel 866.751.5174 Fax PO Box 3877 Portland OR 97208

- To request Oregon Paid Family And Medical Leave (OR PFML), the employee requesting OR PFML must complete Part A of the Request For Oregon Paid Family And Medical Leave (Form OR PFML-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 Oregon Paid Family And Medical Leave (Form OR PFML-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 Oregon Paid Family And Medical Leave (Form OR PFML-1) with the required additional form(s) to The Standard. 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 OR PFML must complete all required information.

Oregon Paid Family And Medical Leave (OR PFML) Request (to be completed by the employee)

Question 9: Bond with child means to care for and bond with a Child during the first year after the Child's birth.

Adoption/Foster child means to care for and bond with a Child during the first year after the placement of the Child through Foster Care or adoption.

Care for Family Member with a Serious Health Condition means Physical Assistance or Psychological Assistance as used for leave taken to care for a Family Member with a Serious Health Condition.

Safe Leave means leave for any purpose described in ORS 659A.272, including leave to:

- Seek legal or law enforcement assistance or remedies to ensure the health and safety of the Eligible Employee or the Eligible
 Employee's minor Child or dependent, including preparing for and participating in protective order proceedings or other civil
 or criminal legal proceedings related to Domestic Violence, Harassment, Sexual Assault or Stalking.
- Seek medical treatment for or to recover from injuries caused by Domestic Violence or Sexual Assault to or Harassment or Stalking of the Eligible Employee or the Eligible Employee's minor Child or dependent.
- Obtain, or to assist a minor Child or dependent in obtaining, counseling from a licensed mental health professional related to an experience of Domestic Violence, Harassment, Sexual Assault or Stalking.
- Obtain services from a victim services provider for the Eligible Employee or the Eligible Employee's minor Child or dependent.
- Relocate or take steps to secure an existing home to ensure the health and safety of the Eligible Employee or the Eligible Employee's minor Child or dependent.
- An Employee applying for PFML Benefits for Safe Leave must provide verification of the basis for the Safe Leave, including any of the following forms of documentation: (a) A copy of a federal agency or state, local, or tribal police report, or a formal complaint to a school's Title IX Coordinator indicating that the Claimant or the Claimant's Child was a victim of Domestic Violence, Harassment, Sexual Assault, or Stalking; (b) A copy of a protective order or other evidence from a federal, state, local, or tribal court, administrative agency, school's Title IX Coordinator, or attorney that the claimant or the Claimant's Child appeared in or was preparing for a civil, criminal, or administrative proceeding related to Domestic Violence, Harassment, Sexual Assault, or Stalking; or (c) Documentation from an attorney, law enforcement officer, Health Care Provider, licensed mental health professional or counselor, member of the clergy, or victim services provider that the claimant or the Claimant's Child was undergoing treatment or counseling, obtaining services, or relocating as a result of Domestic Violence, Harassment, Sexual Assault, or Stalking; or

In cases where a Claimant can demonstrate Good Cause for not providing one of the forms of documentation in section (i), the claimant may instead provide a written statement attesting that they are taking eligible Safe Leave. Good Cause for not providing the documentation is determined at our discretion and includes, but is not limited to, the following:

- (A) Difficulty obtaining verification due to a lack of access to services; or
- (B) Concerns for the safety of the Claimant or the Claimant's Child.

Own Serious Health Condition due to Covered Employee serving as a Bone Marrow Donor

Own Serious Health Condition due to Covered Employee serving as an Organ Donor

Own Serious Health Condition due to pregnancy means any period of disability due to pregnancy, childbirth, miscarriage or stillbirth, or period of absence for prenatal care.

Own Serious Health Condition (other) means an illness, injury, impairment, or physical or mental condition of an Eligible Employee.

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Oregon Paid Family And Medical Leave (OR PFML) Request (to be completed by the employee) continued

Question 10: Family Member means an employee's spouse, sibling, child, grandparent, grandchild, parent or an individual related to the employee by blood or affinity whose close association with an eligible employee is the equivalent of a family relationship.

Sibling means the Eligible Employee's, or the Eligible Employee's Spouse's or Domestic Partner's, sibling or stepsiblings.

Child means a biological, adopted or foster child, a stepchild or legal ward, a child to whom the employee stands in loco parentis.

Grandchild means an Eligible Employee's, or an Eligible Employee's Spouse's or Domestic Partner's, child of the Child.

Grandparent means an Eligible Employee's, or an Eligible Employee's Spouse's or Domestic Partner's, parent of the Parent. **Parent** means (a) the biological, adoptive, step or foster mother or father of the Eligible Employee; (b) a person who was a foster parent of an Eligible Employee when the Eligible Employee was a minor; (c) a person designated as the legal guardian of an Eligible Employee at the time the Eligible Employee was a minor or required a legal guardian; (d) a person with whom an Eligible Employee was or is in a relationship of in loco parentis; or (e) a parent of an Eligible Employee's Spouse or Domestic Partner.

Spouse means a person to whom an Eligible Employee is legally married.

Family Member equivalent means an individual related to the employee by blood or affinity whose close association with an eligible employee is the equivalent of a family relationship.

Affinity means a relationship that meets the following requirements:

There is a significant personal bond that is like a family relationship, and;

The relationship has characteristics of a family relationship, which may include, but is not limited to the following:

- (A) Shared personal financial responsibility, including shared leases, common ownership of real or personal property, joint liability for bills, or beneficiary designations;
- (B) Emergency contact designations;
- (C) The expectation to provide care because of the relationship or the prior provision of care;
- (D) Cohabitation; and
- (E) Geographical proximity.

Question 11: If dates are "Consecutive", the employee must provide the start and end dates of the requested OR PFML. These dates should be the actual dates that the OR PFML will begin and end. If uncertain, estimate the start and end dates and indicate "Dates are estimated". If dates are "Intermittent", enter the dates OR PFML will be taken. Please be as specific as possible. If the dates are unknown or estimated, indicate "Dates are estimated".

Intermittent Leave means leave taken in separate periods of time due to a single Qualifying Reason, rather than for one continuous period of time. Intermittent leave shall be taken in increments of no less than one Work Day and will be paid in increments that are equivalent to one Work Week.

If dates are estimated, The Standard may require you to submit a request for payment after the OR PFML day is taken. Payment for approved claims will be due 7 calendar days from the date of the claim decision.

Exclusions: PFML benefits will not be payable if the employee would not be performing their employment duties for reasons including but not limited to circumstances related to:

- (a) An employer's business operations, such as: a lapse in seasonal operations; school break periods; or other suspensions or cessations of an employer's business operations.
- (b) A period of incarceration, in which an individual is unable to perform their employment duties as a result of being an adult in custody.

Question 12: The Claimant must provide written notice to the Employer at least 30 calendar days in advance of foreseeable PFML. Verbal notice by the Claimant or a Family Member must be provided to the Employer within 24 hours of unforeseeable leave. In the context of Safe Leave, if it is not possible to provide notice in these timeframes, notice should be provided as soon as practicable. If the explanation will not fit in the space provided, enter "See Attached" and add an attachment with the explanation. Be sure to include the employee's full name and their date of birth at the top of the attachment.

Employment Information (to be completed by the employee)

Question 14: 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 21: List all other income you will be receiving while on OR PFML. Include the type/name of income and how much. Example Employer Sponsored Paid leave for \$500.00 a week.

If you are pre-submitting form: Indicate if the employee is pre-submitting their OR PFML 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. **Payment for approved claims will be due 7 calendar days from the date of the claim decision.** If a Complete Application is approved more than 7 calendar days before the onset of PFML, we will commence payment of PFML Benefits as soon as PFML begins.

If The Standard does not permit pre-submitting, The Standard must return the Request for Oregon Paid Family And Medical 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.

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

The employer of the employee requesting OR PFML 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 8a:** Indicate number of hours the employee typically works per week. Example: 20, 32, or 40.

Question 9: PFML benefits will not be payable for any period of a week or longer that the Eligible Employee is not expected to be available to work or able to work for the Employer based on circumstances related to the Employer's business, including but not limited to: a. A lapse in seasonal operations

- b. School breaks
- c. Other suspensions or cessations of an Employer's business operations.

During an Eligible Employee's period of incarceration, in which they are unable to perform their employment duties for the Employer as a result of being an adult in custody.

Question 10a: "Wage" or "wages": For the purpose of payment of benefits, means a Covered Employee's remuneration from the Employer for employment and dismissal payments. May include variable pay in addition to their usual earnings, such as overtime pay, extended work hours (not necessarily OT), bonus pay, commissions and the like during the last 12 months.

Average Weekly Wage means the Eligible Employee's weekly Subject Wages in effect with the Employer on the day immediately preceding the date PFML begins. For Eligible Employees who are paid hourly, the Average Weekly Wage is based on the hourly pay rate multiplied by the number of hours regularly scheduled to work for the Employer per week. If the Eligible Employee does not have regular work hours, the Average Weekly Wage is based on the average number of hours worked per week for the Employer during the preceding 52 calendar weeks (or during the period of Employment with the Employer if less than 52 weeks). If an Eligible Employee is paid on an annual contract basis, the Average Weekly Wage is based on one-fifty-second (1/52nd) of the Eligible Employee's annual contract salary with the Employer. If an Eligible Employee has multiple Employers, the Average Weekly Wage will be calculated for each employer separately.

Question 10b: An example of employees not subject to Social security and/or Medicare are certain public employees contributing to their own program and student employees of colleges and universities.

Question 11a-b: OR PFML employer reimbursement is only permitted for Wage continuation, including a paid family and/or medical leave policy of the employer. Wage continuation is an employer's continued payment of an employee's wages during a period of PFML leave. Accrued Paid Leave is not wage continuation.

3 of 6

The Employer is not eligible for reimbursement for Accrued Paid Leave paid to the Eligible Employee.

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

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

Request For

| 866.756.8116 Tel 866.751.5174 Fax PO Box 3877 Portland OR 97208 | | | Ore | egon Paid | | and Medical Leave Form OR PFML-1 | | |
|---|--|---|---|--|--|--------------------------------------|--|--|
| TO BE COMPLETED BY THE EMPLOYEE | | | | | | | | |
| | | | Employee's c | Employee's date of birth (MM/DD/YYYY) | | | | |
| PART A - EMPLOYEE INFORMATION | N (to be comp | leted | by the en | ıployee) | | | | |
| Employee's legal name (first name, middle initial, last | st name) | 2. Oth | er last names | s, if any, under v | which emplo | oyee has worked | | |
| 3. Employee's mailing address Street | City | | | State | Zip Code | Country (if not USA) | | |
| o. Employees maining address | City | | | Oldio | Zip oodo | Godinity (ii flot Go/ty | | |
| 4. Employee's Social Security Number or TIN 5. Em | nployee's date of birtl | h (MM/D | D/YYYY) | 6. Employ | ee's primar | y telephone number | | |
| 7. Employee's preferred email address while on OR PF | 7. Employee's preferred email address while on OR PFML (if available) | | | | 8. Employee's gender ☐ Male ☐ Female ☐ Not designated/Other | | | |
| | ndition Safe Lean mployee serving as a mployee serv | a Bone Man Organ ealth Co domestic dians (or s / ate (MM/I | Donor ndition (other partner spouse's pare DD/YYYY) employer, pl | Family Int) Grandp Dates a Dates a ease explain: | | Grandchild d | | |
| City | Sta | ate | | Zip code | | Country (if not U.S.A.) | | |
| 17. Employer's telephone number for contact regarding thi | e request 10 | le ample | wee receiving | Workers' Comp | neation Pon | nefite Unemployment | | |
| () | s request. | 18. Is employee receiving Workers' Compensation Benefits, Unemployment Benefits, or income from any other sources? ☐ Yes ☐ No | | | | | | |
| 19. Have you had a decrease in wages in the last 12 mo | | | r current emr | oloyer? | . □ No | | | |
| 20. List all other employment or Employers in last 12 me | | with you | - Carrent emp | noyer: — res | , | | | |
| | | | | | | | | |
| 21. List income you will be receiving while on OR PFML | , source of pay and a | amount. | | | | | | |
| 22. Have you taken any leave in the last 12 months? Yes No | 23 | . If yes li | st dates and | type of leave: | | | | |
| Disclosure statement: Information regarding OR types of leave, will be provided to the employer. | PFML benefits red | ceived b | y the emplo | oyee, such as | payments | s received, dates and | | |
| Declaration and signature Some states require us to inform you that any per company, or other person, files a statement contraint a fraudulent insurance act which is subject to civil deemed a felony and substantial fines may be immore My signature affirms that the information I am pro | aining false or misle I and/or criminal pe posed. | eading i enalties | nformation , depending | concerning a g upon the sta | ny fact ma ite. Such a | terial hereto commits actions may be | | |

Date signed (MM/DD/YYYY)

Employee's signature

 $\begin{array}{lll} 866.756.8116~Tel & 866.751.5174~Fax\\ PO~Box~3877 & Portland~OR~97208 \end{array}$

Request For Oregon Paid Family And Medical Leave (Form OR PFML-1)

| TO BE COMPLETED BY THE EMPLOYE | E | | | | |
|--|--|---------------------------------------|---------------------|--|--|
| Employee's name (first name, middle initial, las | Employee's date | Employee's date of birth (MM/DD/YYYY) | | | |
| PART B - EMPLOYER INFORM | ATION (to be completed by the | employer) | | | |
| 1. Business's full legal name and mailing addre | ess | • | | | |
| Mailing address | | | | | |
| City | State | Zip code Country (if not U.S.A.) | | | |
| 2. Employer's FEIN | | | | | |
| 3. Employer's EIN | 4. Employer's contact name for questions relat | ed to OR PFML | | | |
| 5. Employer's contact telephone number 6. E | mployer's contact email address | | | | |
| 7a. Employee's date of hire (MM/DD/YYYY) | 7b. Employee's last day physically at work (Mi | M/DD/YYYY) | | | |
| 8a. Employee's Typical Work Week Hours | | | | | |
| - | day 🗌 Tuesday 🔲 Wednesday 🔲 Thurs | day 🗌 Friday [| ☐ Saturday ☐ Sunday | | |
| 8c. If Employee's Work Hours are rotating, indic | cate hours and rotation | | | | |
| to a lapse in seasonal operations, school breaks, or other suspensions or cessations of business operations. (example: December 18 - January 1 and March 25 - March 31 or N/A if not applicable). *PFML benefits will not be payable for any period of incarceration in which an individual is unable to perform their employment duties as a result of being an adult in custody. List all dates, if known. | | | | | |
| 10a. Employee's Average Weekly Wage: | | | | | |
| 10b. Is employee subject to: Social Security | taxes? | Yes 🗌 No | | | |
| 10c. Has employee met the annual limit to Soc | cial Security max. contribution? | o □ N/A | | | |
| 11a. Will any full days of Wage continuation, including the employer's own internal paid family and/or medical leave policy, be used by or paid to the employee in place of OR PFML benefits? Yes No If so, please provide dates where full days of Wage Continuation are being paid. *Wage continuation is an employer's continued payment of an employee's regular salaried wages during a period of PFML leave. Accrued Paid Leave, which includes sick leave, Oregon Paid Sick Leave, annual leave, vacation leave, personal leave, compensatory leave or paid time off is not Wage continuation. The Employer is not eligible for reimbursement of PFML benefits for Accrued Paid Leave paid to the Eligible Employee. | | | | | |
| 11b. If employee received or will receive full wages while on OR PFML, will employer be requesting reimbursement of the PFML benefit amounts? Yes No | | | | | |
| 12. Is the employee receiving Workers' Compensation Benefits or Unemployment Benefits? Yes No Effective date of benefits: | | | | | |
| 13. OR PFML policy number | | | | | |
| 14. Additional information: | | | | | |

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Request For Oregon Paid Family And Medical Leave (Form OR PFML-1)

| TO BE COMPLETED BY THE EMPLOYI | ≣Ε | | |
|--|---|-------------------|--|
| Employee's name (first name, middle initial, last name) | | | nployee's date of birth (MM/DD/YYYY) |
| PART B - EMPLOYER INFORM | IATION (to be completed | by the empl | oyer) (Continued) |
| OR PFML insurance carrier's name and mailing | ng address | | |
| Standard Insurance Company | | | |
| PO Box 3877 | | | |
| Portland, OR 97208 | | | |
| 866-751-5174 Fax | | | |
| Declaration and signature | | | |
| \square I affirm the employee meets the eligibi | lity for Oregon Paid Family And Me | dical Leave. | |
| Some states require us to inform you that company, or other person, files a statem a fraudulent insurance act which is subject deemed a felony and substantial fines many substantial f | ent containing false or misleading ect to civil and/or criminal penalties | information con | cerning any fact material hereto commits |
| My signature affirms that the information | I am providing is true and accura | te to the best of | my knowledge and belief. |
| Employer's authorized signature | Date signed (MM/DD/YYYY) | | |
| | | | |
| Title | | | |
| | | | |

Oregon Paid Family And Medical Leave Bonding Certification (Form OR PFML-2) Instructions

866.756.8116 Tel 866.751.5174 Fax PO Box 3877 Portland OR 97208

If the employee is requesting Oregon Paid Family And Medical Leave (OR PFML) to bond with a newborn, an adopted child or a foster child, the employee must submit the *Bonding Certification* (Form OR PFML-2) with the *Request For Oregon Paid Family And Medical Leave* (Form OR PFML-1).

BONDING CERTIFICATION (to be completed by the employee)

The employee requesting OR PFML must complete all applicable requested information. Send completed forms and supporting documentation to The Standard.

If this form is being submitted in advance (pre-submitting) and some information is unknown, the insurance carrier will contact the employee and explain how to provide the required additional information.

Question 1 & 2: If the form is submitted to the OR PFML insurance carrier prior to the birth of a child, this is considered presubmitting. The employee is then required to provide the required documentation of the child's birth to the OR PFML insurance carrier. The OR PFML carrier will tell the employee how to provide the required additional documentation.

There may be instances where OR PFML can be taken before the adoption or foster care is finalized. For example, the employee may be required to appear in court or travel to another country as part of the adoption or foster care process. The employee should include documentation to show that the OR PFML is necessary to further the adoption or foster care.

Question 5: See chart below for documentation details. Unless specified, do not send the original documents.

| Bonding Form/Certification | Description |
|---|---|
| Health Care Provider certification of pregnancy | An original letter obtained from the birth mother's Health Care Provider that certifies pregnancy. It should include the mother's name and the expected due date. |
| Health Care Provider certification of birth | An original letter obtained from the birth mother's Health Care Provider that includes the mother's name and child's date of birth. |
| Birth Certificate | A copy of the certificate issued by the city or county office in which the child is born. |
| Voluntary Acknowledgment of Paternity | A copy of the form that establishes legal fatherhood when the parents are unmarried. Completed by both mother and father. |
| Court Order | Documentation of the order from the family court that names the father of a child. Establishes legal fatherhood when the parents are unmarried. Completed by both mother and father. |
| Marriage Certificate | A copy of the official statement issued by the town or city clerk from which the marriage certificate was issued. |
| Civil union/domestic partner's documentation | A copy of the certificate of civil union or domestic partnership. |
| Foster care placement letter | A copy of the letter of foster care placement issued by the county or city department of social services or authorized voluntary foster care agency. |
| Court documents of adoption | A copy of the court document finalizing adoption or documentation in furtherance or court order finalizing adoption. |
| Other documentation | Other documentation of parental relationship may be accepted if none of the others listed apply. |

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Oregon Paid Family And Medical Leave Bonding Certification (Form OR PFML-2)

TO BE COMPLETED BY THE EMPLOYEE

| Employee's legal name (first name, middle initial, last name) | | | | Employee's date of birth (MM/DD/YYYY) | | |
|--|--|-------------------|----------------|--|--|--|
| Other last names, if any, under which employee has worked | | | | Employee's Social Security Number or TIN | | |
| Employee's mailing address Street | | | | | | |
| City | | State | Zip Code | Country (if not U.S.A.) | | |
| BONDING CERTIFICATION | ON (to be completed by the | employe | e) | | | |
| 1. Child's date of birth (MM/DD/YYYY) | 2. Child's gender | | 3. Does child | live with the employee requesting OR PFML? | | |
| , | ☐ Male ☐ Female ☐ Not designate | 1 | ☐ Yes [| | | |
| 4. Child is employee's: | | | | | | |
| ☐ Biological child ☐ Stepch | nild | ted child | ☐ Legal wa | urd | | |
| ☐ in loco parentis child ☐ Spous | e/Domestic partner's child | | | | | |
| 5. Select one of the following and attach | n the document as required as evidence | e of the relation | nship. | | | |
| Parent of newborn child: | | | | | | |
| Birth mother | | | | | | |
| ☐ Health Care Provider certifi | ication of pregnancy (include expected | due date AND | mother's nar | me): OR | | |
| _ | ication of birth (include date of birth of | | | | | |
| ☐ Child's birth certificate | isation of shar (morado date of shar of | 011110711101 | nor o marrioj, | | | |
| Other parent | | | | | | |
| Copy of birth certificate na | ming accord parent: OR | | | | | |
| | | | | | | |
| ☐ Voluntary acknowledgment | | | | | | |
| ☐ Court order of Paternity; O | | | | | | |
| <u> </u> | ee above) PLUS one of the following: | | | | | |
| ☐ Marriage certificate; (| | | | | | |
| ☐ Certificate of civil unio | | | | | | |
| ☐ Evidence of domestic | | | | | | |
| OR; Other documentation | of parental relationship | | | | | |
| Foster parent | | | | | | |
| Letter of foster care placen foster care agency | nent or anticipated placement issued b | y county or cit | y department | of Social Services or authorized voluntary | | |
| Adoptive parent | | | | | | |
| Court document finalizing adoption | | | | | | |
| ☐ Documentation in furtherance of adoption | | | | | | |
| 6. Date of foster care or adoption placement, if applicable (MM/DD/YYYY) | | | | | | |
| Declaration and signature | | | | | | |
| Some states require us to inform you that any person who knowingly and with intent to injure, defraud or deceive an insurance company, or other person, files a statement containing false or misleading information concerning any fact material hereto commits a fraudulent insurance act which is subject to civil and/or criminal penalties, depending upon the state. Such actions may be deemed a felony and substantial fines may be imposed. | | | | | | |
| My signature affirms that the inform | ation I am providing is true and ac | curate to the | best of my | knowledge and belief. | | |
| Employee's signature | | | Date signed | (MM/DD/YYYY) | | |
| | | | | | | |