

# Military Qualifying Event (Form PFL-5) Instructions

If an employee is requesting PFL because of a family member's covered active military duty or impending covered active duty, the employee must submit 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 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 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 qualifying supporting documents:

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

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

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



**TO BE COMPLETED BY THE EMPLOYEE**

**Employee's 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**

Mailing address \_\_\_\_\_

City, State \_\_\_\_\_ Zip code \_\_\_\_\_ Country (if not U.S.A.) \_\_\_\_\_

**MILITARY QUALIFYING EVENT (to be completed by the employee)**

**1. Name of military member on covered active duty or impending call to covered active duty status (international deployment)** (first name, middle initial, last name) \_\_\_\_\_

**2. Military member's date of birth** (MM/DD/YYYY)  /  /

**3. Military member's gender**  Male  Female  Not designated/Other

**4. Military member's mailing address**

Mailing address \_\_\_\_\_

City, State \_\_\_\_\_ Zip code \_\_\_\_\_ Country (if not U.S.A.) \_\_\_\_\_

**5. The above-named military member is employee's:**  Spouse  Domestic partner  Child  Parent

**6. Period of military member's covered active duty** (MM/DD/YYYY)  /  /  to  /  /

**7. Please select one of the following and attach the indicated document to support that the military member is on covered active duty or impending call or order to covered active duty status:**

Covered active duty orders  Letter of impending call or order to covered duty  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)**

**8. What is the reason employee is requesting PFL?** (One or more reasons may be selected.)

Arranging for child care  Acting as military member's representative before a federal, state, or local agency for purpose of obtaining, arranging, or appealing military service benefits

Arranging for parental care  Attending any event sponsored by the military or military service organizations

Counseling  Other \_\_\_\_\_

Making financial arrangements

Making legal arrangements

Form PFL-5 continued on next page



**TO BE COMPLETED BY THE EMPLOYEE**

**Employee's name** (first name, middle initial, last name)

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

/   /

**MILITARY QUALIFYING EVENT** (to be completed by the employee) - continued from prior page

*Form PFL-5 continued from prior page*

**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 PFL leave due to a qualifying event includes any available written documentation which supports the need for leave; such documentation may include a copy of a meeting announcement for informational briefings sponsored by the military; a document confirming the military member's Rest and Recuperation leave; a document confirming an appointment with a third party, such as a counselor or school official, or staff at a care facility; or a copy of a bill for services for the handling of legal or financial affairs. If leave is requested to meet with a third party, the employee must provide the supporting documentation of the meeting that includes the name, address, appropriate contact information of the individual or entity with whom you are meeting (i.e., either telephone number, fax number, or email address of the individual or entity).

**Declaration and signature**

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.

I am hereby making a request for paid family leave benefits under the NYS Workers' Compensation Law. My signature affirms that the information I am providing is true and accurate to the best of my knowledge and belief.

Employee's signature

Date signed (MM/DD/YYYY)

/   /

**TO BE COMPLETED BY THE EMPLOYEE**

**Employee's name** (first name, middle initial, last name)

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

□□ / □□ / □□□□

**Other last names, if any, under which employee has worked**

**Employee's Social Security Number or TIN**

□□□□ - □□ - □□□□

**Employee's mailing address**

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 meeting/event.**

**Name of individual with whom employee is meeting** \_\_\_\_\_

**Title** \_\_\_\_\_

**Organization** \_\_\_\_\_

**Telephone number** (provide area or country code) \_\_\_\_\_

**Fax number** (provide area or country code) \_\_\_\_\_

**Email address** \_\_\_\_\_

**Mailing address**

Mailing address

City, State

Zip code

Country (if not U.S.A.)

**Describe nature of meeting. Include dates, if known:**

