

**LF PFL-1 PART A - EMPLOYEE INFORMATION** (to be completed by employee)

**The employee requesting leave is responsible for the completion of these forms.**

The employee requesting PFL must complete Part A of the **Request for Paid Family Leave (Form LF 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.

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 (LF PFL-5)** with the **Request For Paid Family Leave (LF PFL-1)** to Lincoln Life & Annuity Company of New York using the address, fax number, or email address above. The employee should retain a copy of each submitted form for their record.

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.

1. Employee's legal name: (first, middle, last) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

2. Employee's address: \_\_\_\_\_ 3. Employee's Social Security number: \_\_\_\_\_

Street Address

\_\_\_\_\_

City State Zip Code

4. Employee's date of birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

5. Employee's primary telephone number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

6. Employee's email address: \_\_\_\_\_

7. Employee's gender:  Male  Female  Not designated / Other

8. Employee's preferred language:  English  Español  Polski  Italiano  Kreyòl ayisyen  
 Русский  中文  한국어  Other \_\_\_\_\_

9. Reason for PFL request:  Newborn Bonding  Adoption Bonding  Foster Care Bonding  
 Military Leave  Family Care

10. Will PFL be for a continuous period of time and/or intermittent?

Continuous  Dates are estimated

PFL start date (MM/DD/YYYY) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ PFL end date (MM/DD/YYYY) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Intermittent  Dates are estimated

Identify dates Intermittent PFL will be taken: \_\_\_\_\_

11. If providing less than 30 days advance notice to the employer, please explain:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**TO BE COMPLETED BY THE EMPLOYEE**

Employee's name: (first name, middle name, last name)

Date of birth: (MM/DD/YYYY)

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
First Middle Last

12. Business Name: \_\_\_\_\_

13. Employee's date of hire: \_\_\_\_/\_\_\_\_/\_\_\_\_

14. Employee's work location:

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

15a. Does employee have more than one employer?  Yes  No

15b. If yes, is employee taking PFL from the other employer?  Yes  No

16. Is employee currently receiving Workers' Compensation Lost Wage Benefits?  Yes  No

**Disclosure Statement:** Information regarding PFL benefits received by the employee, such as payments received and types of leave, will be provided to the employer.

**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)

**Payment Method**

If your claim is approved, payments will be sent in the form of a check, or you may choose to receive your payment through Direct Deposit (electronic funds transfer). This will eliminate mail delays and ensure your payment is deposited directly into your bank account on the date it is due each month. You may not be charged any fees for services that are necessary to access your benefits in full.

You also may elect Direct Deposit at any time by calling (800) 423-2765, or by going to our website, [www.Lincoln4Benefits.com](http://www.Lincoln4Benefits.com).

Please indicate your preferred method of payment for your benefits.

Check  Direct Deposit

**For Payment Method Direct Deposit:**

Financial Institution's name : \_\_\_\_\_

**Type of Account:**  Checking  Savings

Bank Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Lincoln Life & Annuity Company of New York**  
Service Office Address: PO Box 2609, Omaha, NE 68103-2609  
Home Office: Syracuse, NY  
Toll free (800) 423-2765 Fax (877) 843-3950  
www.LincolnFinancial.com  
disabilityclaims@lfg.com

**LF PFL-1 PART B - EMPLOYER INFORMATION** (to be completed by the employer)

The employer of the employee requesting PFL must complete all information in Part B. Employer signs and dates, and then returns to the employee requesting PFL within three business days.

Employee's name: (first name, middle name, last name) Date of birth: (MM/DD/YYYY)

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
First Middle Last

1. Business's full legal name and address:

Business Name

Street Address

City

State

Zip Code

NY Statutory Disability/Paid Family Leave Policy Number: \_\_\_\_\_

Claim Location Number: \_\_\_\_\_

2. Employer's FEIN: \_\_\_\_\_ 3. Employer's Standard Industrial Classification (SIC) Code: \_\_\_\_\_

4. Employer's contact name for questions related to PFL:

\_\_\_\_\_

5. Employer's contact telephone number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

6. Employer's contact email address: \_\_\_\_\_

7. Employee's date of hire (MM/DD/YYYY): \_\_\_\_/\_\_\_\_/\_\_\_\_

8. Employee's occupation: \_\_\_\_\_

Codes are available at [www.bls.gov/soc2010/soc.alpha.htm](http://www.bls.gov/soc2010/soc.alpha.htm): \_\_\_\_\_



**TO BE COMPLETED BY THE EMPLOYEE**

Employee's name: (first name, middle name, last name)

Date of birth: (MM/DD/YYYY)

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
First Middle Last

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

11a. In the preceding 52 weeks has the employee taken leave for:

- NY Statutory Disability     PFL     Both NY Statutory Disability and PFL     None

11b. Enter the total number of weeks and days taken for both NY Statutory Disability and PFL in the last 52 weeks:

**NOTE:** The maximum number of weeks available for NY Statutory Disability and PFL in any 52 week period is 26 weeks. Specify the total number of weeks, as well as the number of additional days if the leave includes a partial week, taken for NY Statutory Disability and PFL during the preceding 52 weeks.

<b>Disability:</b>	Weeks:	Please provide specific dates for Disability:
	Days:	

<b>PFL:</b>	Weeks:	Please provide specific dates for PFL:
	Days:	

12. Is the employee taking leave under the federal Family Medical Leave Act (FMLA) concurrently with PFL?     Yes     No

**Declaration and Signature**

I affirm the employee regularly works 20 or more hours per week and has been in employment for at least 26 consecutive weeks OR the employee regularly works less than 20 hours per week and has worked at least 175 days.

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 the person authorized to sign as the employer of the employee requesting PFL. My signature affirms that to the best of my knowledge and belief, the information I have provided is true and accurate.

**Employer's authorized signature**

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Title

**LF PFL - 5 MILITARY QUALIFYING EVENT CERTIFICATION (to be completed by the employee)**

Employee's legal name: (first, middle, last) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Employee's date of birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Employee's Social Security Number or TIN: \_\_\_\_\_

Employee's address:

Street Address

City

State

Zip Code

1. Name of Military Member on covered active duty or impending call to covered active duty status:

\_\_\_\_\_  
First Middle Last

2. Military Member Date of Birth (MM/DD/YYYY): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

3. Military Member Gender:  Male  Female  Not designated / Other

4. Military Member Mailing Address:

Street 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 on 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

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 organization  
 Counseling  Other \_\_\_\_\_  
 Making financial arrangements  
 Making legal arrangements

**TO BE COMPLETED BY THE EMPLOYEE**

Employee's name: (first name, middle name, last name)

Date of birth: (MM/DD/YYYY)

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
First Middle Last

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).

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**Declaration and Signature**

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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)