

# NEW HIRE PAYROLL PACKET

This packet is to be completed by **full-time, benefits-eligible** employees prior to the first day of assignment at Frazier School District. A driver's license and Social Security card will also be required. Alternate documentation is acceptable according to the List of Acceptable Documents (Form I-9) enclosed. Please bring original, valid identification to the Business Office along with this packet so copies can be made.

Updated clearances are required in the Superintendent's Office if not provided at time of application.

Please contact Erin at 724-736-9507 Ext. 110 with questions.

## FRAZIER SCHOOL DISTRICT

TO: \_\_\_\_\_

FROM: Erin Clausner, Payroll Clerk

SUBJECT: Benefits Paperwork

Congratulations on your new assignment with Frazier School District! As a full-time employee of the District, you are eligible to enroll in benefits as described below. Please complete the attached and return to me as soon as possible. Your eligibility is effective \_\_\_\_\_.

A few things to note:

- The Intermediate Unit #1 enrollment form is for medical, dental, and/or vision coverages if you choose to be covered under the District plan.
- You may choose dental and/or vision coverages for yourself- dental only for dependents -regardless of your medical coverage election. This premium is paid by the District. (Please provide copies of Social Security cards and marriage certificate for spousal coverage, Social Security cards and birth certificates for coverage of any/all dependent children.)
- If you have the same or similar medical insurance elsewhere, please indicate your election of the medical allowance on the appropriate enclosed form.
- If you decline coverage at this time, unless you experience a defined qualifying event, the next opportunity to enroll will be for coverage effective July 1, 2021.
- UNUM forms are for disability insurance. This is coverage for the employee only and is paid for by the District.
- The Sun Life Employee Application is for life insurance coverage. Again, coverage is for the employee, paid by the District.
- The District offers voluntary enrollment in a healthcare flex benefit plan (FSA) through American Fidelity. This account is 100% funded by the employee. (Open enrollment for this plan will become effective again July 1, 2021.)
- Additional voluntary insurance products are available through American Fidelity. If you are interested, please call me for contact information.
- Also, if you have/open an account with Fayette County School Employees' Federal Credit Union, you may have an amount of your choosing deducted and forwarded from your pay.

If you have any questions, please contact me at Ext. 110. Best wishes in your new position.

**Employee's Withholding Certificate**

OMB No. 1545-0074

- **Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.**  
 ► **Give Form W-4 to your employer.**  
 ► **Your withholding is subject to review by the IRS.**

**2020****Step 1:  
Enter  
Personal  
Information**

(a) First name and middle initial	Last name	(b) Social security number
Address		► <b>Does your name match the name on your social security card?</b> If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to <a href="http://www.ssa.gov">www.ssa.gov</a> .
City or town, state, and ZIP code		
(c) <input type="checkbox"/> <b>Single or Married filing separately</b> <input type="checkbox"/> <b>Married filing jointly</b> (or Qualifying widow(er)) <input type="checkbox"/> <b>Head of household</b> (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

**Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5.** See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.

**Step 2:  
Multiple Jobs  
or Spouse  
Works**

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

- (a) Use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App) for most accurate withholding for this step (and Steps 3–4); **or**  
 (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; **or**  
 (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld . . . . . ► ☐

**TIP:** To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

**Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs.** Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

<b>Step 3: Claim Dependents</b>	If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):		
	Multiply the number of qualifying children under age 17 by \$2,000 ► \$		
	Multiply the number of other dependents by \$500 . . . . . ► \$		
	Add the amounts above and enter the total here . . . . .	<b>3</b>	\$
<b>Step 4 (optional): Other Adjustments</b>	(a) <b>Other income (not from jobs).</b> If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income . . . . .	<b>4(a)</b>	\$
	(b) <b>Deductions.</b> If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here . . . . .	<b>4(b)</b>	\$
	(c) <b>Extra withholding.</b> Enter any additional tax you want withheld each pay period .	<b>4(c)</b>	\$

**Step 5:  
Sign  
Here**

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

► **Employee's signature** (This form is not valid unless you sign it.)

► **Date**

**Employers  
Only**

Employer's name and address	First date of employment	Employer identification number (EIN)
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## General Instructions

### Future Developments

For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to [www.irs.gov/FormW4](http://www.irs.gov/FormW4).

### Purpose of Form

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, you will generally owe tax when you file your tax return and may owe a penalty. If too much is withheld, you will generally be due a refund. Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505.

**Exemption from withholding.** You may claim exemption from withholding for 2020 if you meet both of the following conditions: you had no federal income tax liability in 2019 and you expect to have no federal income tax liability in 2020. You had no federal income tax liability in 2019 if (1) your total tax on line 16 on your 2019 Form 1040 or 1040-SR is zero (or less than the sum of lines 18a, 18b, and 18c), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2020 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1a, 1b, and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 16, 2021.

**Your privacy.** If you prefer to limit information provided in Steps 2 through 4, use the online estimator, which will also increase accuracy.

As an alternative to the estimator: if you have concerns with Step 2(c), you may choose Step 2(b); if you have concerns with Step 4(a), you may enter an additional amount you want withheld per pay period in Step 4(c). If this is the only job in your household, you may instead check the box in Step 2(c), which will increase your withholding and significantly reduce your paycheck (often by thousands of dollars over the year).

**When to use the estimator.** Consider using the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App) if you:

1. Expect to work only part of the year;
2. Have dividend or capital gain income, or are subject to additional taxes, such as the additional Medicare tax;
3. Have self-employment income (see below); or
4. Prefer the most accurate withholding for multiple job situations.

**Self-employment.** Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay these taxes through withholding from your wages, use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App) to figure the amount to have withheld.

**Nonresident alien.** If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

## Specific Instructions

**Step 1(c).** Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

**Step 2.** Use this step if you (1) have more than one job at the same time, or (2) are married filing jointly and you and your spouse both work.

Option (a) most accurately calculates the additional tax you need to have withheld, while option (b) does so with a little less accuracy.

If you (and your spouse) have a total of only two jobs, you may instead check the box in option (c). The box must also be checked on the Form W-4 for the other job. If the box is checked, the standard deduction and tax brackets will be cut in half for each job to calculate withholding. This option is roughly accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld, and this extra amount will be larger the greater the difference in pay is between the two jobs.



**Multiple jobs.** Complete Steps 3 through 4(b) on only one Form W-4. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

**Step 3.** Step 3 of Form W-4 provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 972, Child Tax Credit and Credit for Other Dependents. You can also include **other tax credits** in this step, such as education tax credits and the foreign tax credit. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

### Step 4 (optional).

**Step 4(a).** Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs or self-employment. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

**Step 4(b).** Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2020 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

**Step 4(c).** Enter in this step any additional tax you want withheld from your pay **each pay period**, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.



**Step 2(b) – Multiple Jobs Worksheet** (Keep for your records.)

If you choose the option in Step 2(b) on Form W-4, complete this worksheet (which calculates the total extra tax for all jobs) on **only ONE** Form W-4. Withholding will be most accurate if you complete the worksheet and enter the result on the Form W-4 for the highest paying job.

**Note:** If more than one job has annual wages of more than \$120,000 or there are more than three jobs, see Pub. 505 for additional tables; or, you can use the online withholding estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App).

- 1 Two jobs.** If you have two jobs or you're married filing jointly and you and your spouse each have one job, find the amount from the appropriate table on page 4. Using the "Higher Paying Job" row and the "Lower Paying Job" column, find the value at the intersection of the two household salaries and enter that value on line 1. Then, **skip** to line 3 . . . . . **1** \$ \_\_\_\_\_
  
- 2 Three jobs.** If you and/or your spouse have three jobs at the same time, complete lines 2a, 2b, and 2c below. Otherwise, skip to line 3.
  - a** Find the amount from the appropriate table on page 4 using the annual wages from the highest paying job in the "Higher Paying Job" row and the annual wages for your next highest paying job in the "Lower Paying Job" column. Find the value at the intersection of the two household salaries and enter that value on line 2a . . . . . **2a** \$ \_\_\_\_\_
  - b** Add the annual wages of the two highest paying jobs from line 2a together and use the total as the wages in the "Higher Paying Job" row and use the annual wages for your third job in the "Lower Paying Job" column to find the amount from the appropriate table on page 4 and enter this amount on line 2b . . . . . **2b** \$ \_\_\_\_\_
  - c** Add the amounts from lines 2a and 2b and enter the result on line 2c . . . . . **2c** \$ \_\_\_\_\_
  
- 3** Enter the number of pay periods per year for the highest paying job. For example, if that job pays weekly, enter 52; if it pays every other week, enter 26; if it pays monthly, enter 12, etc. . . . . **3** \_\_\_\_\_
  
- 4 Divide** the annual amount on line 1 or line 2c by the number of pay periods on line 3. Enter this amount here and in **Step 4(c)** of Form W-4 for the highest paying job (along with any other additional amount you want withheld) . . . . . **4** \$ \_\_\_\_\_

**Step 4(b) – Deductions Worksheet** (Keep for your records.)

- 1** Enter an estimate of your 2020 itemized deductions (from Schedule A (Form 1040 or 1040-SR)). Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 10% of your income . . . . . **1** \$ \_\_\_\_\_
  
- 2** Enter:  $\left\{ \begin{array}{l} \bullet \$24,800 \text{ if you're married filing jointly or qualifying widow(er)} \\ \bullet \$18,650 \text{ if you're head of household} \\ \bullet \$12,400 \text{ if you're single or married filing separately} \end{array} \right\}$  . . . . . **2** \$ \_\_\_\_\_
  
- 3** If line 1 is greater than line 2, subtract line 2 from line 1. If line 2 is greater than line 1, enter "-0-" . . . . . **3** \$ \_\_\_\_\_
  
- 4** Enter an estimate of your student loan interest, deductible IRA contributions, and certain other adjustments (from Schedule 1 (Form 1040 or 1040-SR)). See Pub. 505 for more information . . . . . **4** \$ \_\_\_\_\_
  
- 5 Add** lines 3 and 4. Enter the result here and in **Step 4(b)** of Form W-4 . . . . . **5** \$ \_\_\_\_\_

**Privacy Act and Paperwork Reduction Act Notice.** We ask for the information on this form to carry out the Internal Revenue laws of the United States. Internal Revenue Code sections 3402(f)(2) and 6109 and their regulations require you to provide this information; your employer uses it to determine your federal income tax withholding. Failure to provide a properly completed form will result in your being treated as a single person with no other entries on the form; providing fraudulent information may subject you to penalties. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation; to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws; and to the Department of Health and Human Services for use in the National Directory of New Hires. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.



**Married Filing Jointly or Qualifying Widow(er)**

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$0	\$220	\$850	\$900	\$1,020	\$1,020	\$1,020	\$1,020	\$1,020	\$1,210	\$1,870	\$1,870
\$10,000 - 19,999	220	1,220	1,900	2,100	2,220	2,220	2,220	2,220	2,410	3,410	4,070	4,070
\$20,000 - 29,999	850	1,900	2,730	2,930	3,050	3,050	3,050	3,240	4,240	5,240	5,900	5,900
\$30,000 - 39,999	900	2,100	2,930	3,130	3,250	3,250	3,440	4,440	5,440	6,440	7,100	7,100
\$40,000 - 49,999	1,020	2,220	3,050	3,250	3,370	3,570	4,570	5,570	6,570	7,570	8,220	8,220
\$50,000 - 59,999	1,020	2,220	3,050	3,250	3,570	4,570	5,570	6,570	7,570	8,570	9,220	9,220
\$60,000 - 69,999	1,020	2,220	3,050	3,440	4,570	5,570	6,570	7,570	8,570	9,570	10,220	10,220
\$70,000 - 79,999	1,020	2,220	3,240	4,440	5,570	6,570	7,570	8,570	9,570	10,570	11,220	11,240
\$80,000 - 99,999	1,060	3,260	5,090	6,290	7,420	8,420	9,420	10,420	11,420	12,420	13,260	13,460
\$100,000 - 149,999	1,870	4,070	5,900	7,100	8,220	9,320	10,520	11,720	12,920	14,120	14,980	15,180
\$150,000 - 239,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	12,790	13,990	15,190	16,050	16,250
\$240,000 - 259,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	12,790	13,990	15,520	17,170	18,170
\$260,000 - 279,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	13,120	15,120	17,120	18,770	19,770
\$280,000 - 299,999	2,040	4,440	6,470	7,870	9,190	10,720	12,720	14,720	16,720	18,720	20,370	21,370
\$300,000 - 319,999	2,040	4,440	6,470	8,200	10,320	12,320	14,320	16,320	18,320	20,320	21,970	22,970
\$320,000 - 364,999	2,720	5,920	8,750	10,950	13,070	15,070	17,070	19,070	21,290	23,590	25,540	26,840
\$365,000 - 524,999	2,970	6,470	9,600	12,100	14,530	16,830	19,130	21,430	23,730	26,030	27,980	29,280
\$525,000 and over	3,140	6,840	10,170	12,870	15,500	18,000	20,500	23,000	25,500	28,000	30,150	31,650

**Single or Married Filing Separately**

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$460	\$940	\$1,020	\$1,020	\$1,470	\$1,870	\$1,870	\$1,870	\$1,870	\$2,040	\$2,040	\$2,040
\$10,000 - 19,999	940	1,530	1,610	2,060	3,060	3,460	3,460	3,460	3,640	3,830	3,830	3,830
\$20,000 - 29,999	1,020	1,610	2,130	3,130	4,130	4,540	4,540	4,720	4,920	5,110	5,110	5,110
\$30,000 - 39,999	1,020	2,060	3,130	4,130	5,130	5,540	5,720	5,920	6,120	6,310	6,310	6,310
\$40,000 - 59,999	1,870	3,460	4,540	5,540	6,690	7,290	7,490	7,690	7,890	8,080	8,080	8,080
\$60,000 - 79,999	1,870	3,460	4,690	5,890	7,090	7,690	7,890	8,090	8,290	8,480	9,260	10,060
\$80,000 - 99,999	2,020	3,810	5,090	6,290	7,490	8,090	8,290	8,490	9,470	10,460	11,260	12,060
\$100,000 - 124,999	2,040	3,830	5,110	6,310	7,510	8,430	9,430	10,430	11,430	12,420	13,520	14,620
\$125,000 - 149,999	2,040	3,830	5,110	7,030	9,030	10,430	11,430	12,580	13,880	15,170	16,270	17,370
\$150,000 - 174,999	2,360	4,950	7,030	9,030	11,030	12,730	14,030	15,330	16,630	17,920	19,020	20,120
\$175,000 - 199,999	2,720	5,310	7,540	9,840	12,140	13,840	15,140	16,440	17,740	19,030	20,130	21,230
\$200,000 - 249,999	2,970	5,860	8,240	10,540	12,840	14,540	15,840	17,140	18,440	19,730	20,830	21,930
\$250,000 - 399,999	2,970	5,860	8,240	10,540	12,840	14,540	15,840	17,140	18,440	19,730	20,830	21,930
\$400,000 - 449,999	2,970	5,860	8,240	10,540	12,840	14,540	15,840	17,140	18,450	19,940	21,240	22,540
\$450,000 and over	3,140	6,230	8,810	11,310	13,810	15,710	17,210	18,710	20,210	21,700	23,000	24,300

**Head of Household**

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$0	\$830	\$930	\$1,020	\$1,020	\$1,020	\$1,480	\$1,870	\$1,870	\$1,930	\$2,040	\$2,040
\$10,000 - 19,999	830	1,920	2,130	2,220	2,220	2,680	3,680	4,070	4,130	4,330	4,440	4,440
\$20,000 - 29,999	930	2,130	2,350	2,430	2,900	3,900	4,900	5,340	5,540	5,740	5,850	5,850
\$30,000 - 39,999	1,020	2,220	2,430	2,980	3,980	4,980	6,040	6,630	6,830	7,030	7,140	7,140
\$40,000 - 59,999	1,020	2,530	3,750	4,830	5,860	7,060	8,260	8,850	9,050	9,250	9,360	9,360
\$60,000 - 79,999	1,870	4,070	5,310	6,600	7,800	9,000	10,200	10,780	10,980	11,180	11,580	12,380
\$80,000 - 99,999	1,900	4,300	5,710	7,000	8,200	9,400	10,600	11,180	11,670	12,670	13,580	14,380
\$100,000 - 124,999	2,040	4,440	5,850	7,140	8,340	9,540	11,360	12,750	13,750	14,750	15,770	16,870
\$125,000 - 149,999	2,040	4,440	5,850	7,360	9,360	11,360	13,360	14,750	16,010	17,310	18,520	19,620
\$150,000 - 174,999	2,040	5,060	7,280	9,360	11,360	13,480	15,780	17,460	18,760	20,060	21,270	22,370
\$175,000 - 199,999	2,720	5,920	8,130	10,480	12,780	15,080	17,380	19,070	20,370	21,670	22,880	23,980
\$200,000 - 249,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,770	24,870
\$250,000 - 349,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,770	24,870
\$350,000 - 449,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,900	25,200
\$450,000 and over	3,140	6,840	9,560	12,140	14,640	17,140	19,640	21,530	23,030	24,530	25,940	27,240





## RESIDENCY CERTIFICATION FORM

### Local Earned Income Tax Withholding

#### TO EMPLOYERS/TAXPAYERS:

This form is to be used by employers and taxpayers to report essential information for the collection and distribution of Local Earned Income Taxes to the local EIT collector. This form must be used by employers when a new employee is hired or when a current employee notifies employer of a name or address change. Use the Address Search Application at [dced.pa.gov/Act32](http://dced.pa.gov/Act32) to determine PSD codes, EIT rates, and tax collector contact information.

EMPLOYEE INFORMATION – RESIDENCE LOCATION			
NAME (Last Name, First Name, Middle Initial)		SOCIAL SECURITY NUMBER <div style="border: 1px solid black; width: 100px; height: 20px; margin: 2px;"></div>	
STREET ADDRESS (No PO Box, RD or RR)			
ADDRESS LINE 2			
CITY	STATE	ZIP CODE	DAYTIME PHONE NUMBER
MUNICIPALITY (City, Borough or Township)			
COUNTY	RESIDENT PSD CODE <div style="border: 1px solid black; width: 100px; height: 20px; margin: 2px;"></div>	TOTAL RESIDENT EIT RATE	

**SCHOOL DISTRICT OF RESIDENCE:**

EMPLOYER INFORMATION – EMPLOYMENT LOCATION			
EMPLOYER BUSINESS NAME (Use Federal ID Name)		EMPLOYER FEIN <div style="border: 1px solid black; width: 100px; height: 20px; margin: 2px;"></div>	
FRAZIER SCHOOL DISTRICT		2 5 1 1 8 1 2 6 6	
STREET ADDRESS WHERE ABOVE EMPLOYEE REPORTS TO WORK (No PO Box, RD or RR)			
142 CONSTITUTION STREET			
ADDRESS LINE 2			
CITY	STATE	ZIP CODE	PHONE NUMBER
PERRYOPOLIS	PA	15473	724-736-9507
MUNICIPALITY (City, Borough or Township)			
PERRYOPOLIS BOROUGH			
COUNTY	WORK LOCATION PSD CODE <div style="border: 1px solid black; width: 100px; height: 20px; margin: 2px;"></div>	WORK LOCATION NON-RESIDENT EIT RATE	
FAYETTE	2 6 0 4 0 5		

CERTIFICATION	
Under penalties of perjury, I (we) declare that I (we) have examined this information, including all accompanying schedules and statements and to the best of my (our) belief, they are true, correct and complete.	
SIGNATURE OF EMPLOYEE	DATE (MM/DD/YYYY)
PHONE NUMBER	EMAIL ADDRESS

For information on obtaining the appropriate MUNICIPALITY (City, Borough, Township), PSD CODES, and EIT (Earned Income Tax) RATES, please refer to the Pennsylvania Department of Community & Economic Development website:

[dced.pa.gov/Act32](http://dced.pa.gov/Act32)



**Employment Eligibility Verification**  
**Department of Homeland Security**  
**U.S. Citizenship and Immigration Services**

**USCIS**  
**Form I-9**  
OMB No. 1615-0047  
Expires 10/31/2022

► **START HERE:** Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

**ANTI-DISCRIMINATION NOTICE:** It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

**Section 1. Employee Information and Attestation** *(Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)*

Last Name (Family Name)		First Name (Given Name)		Middle Initial	Other Last Names Used (if any)	
Address (Street Number and Name)			Apt. Number	City or Town		State ZIP Code
Date of Birth (mm/dd/yyyy)	U.S. Social Security Number [ ][ ] - [ ][ ] - [ ][ ][ ][ ]		Employee's E-mail Address		Employee's Telephone Number	

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

<input type="checkbox"/> 1. A citizen of the United States	
<input type="checkbox"/> 2. A noncitizen national of the United States (See instructions)	
<input type="checkbox"/> 3. A lawful permanent resident (Alien Registration Number/USCIS Number): _____	
<input type="checkbox"/> 4. An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy): _____ Some aliens may write "N/A" in the expiration date field. (See instructions)  <i>Aliens authorized to work must provide only one of the following document numbers to complete Form I-9: An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.</i>  1. Alien Registration Number/USCIS Number: _____ <b>OR</b> 2. Form I-94 Admission Number: _____ <b>OR</b> 3. Foreign Passport Number: _____ Country of Issuance: _____	QR Code - Section 1 Do Not Write In This Space

Signature of Employee	Today's Date (mm/dd/yyyy)
-----------------------	---------------------------

**Preparer and/or Translator Certification (check one):**

☐ I did not use a preparer or translator. ☐ A preparer(s) and/or translator(s) assisted the employee in completing Section 1.

*(Fields below must be completed and signed when preparers and/or translators assist an employee in completing Section 1.)*

I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.

Signature of Preparer or Translator		Today's Date (mm/dd/yyyy)	
Last Name (Family Name)		First Name (Given Name)	
Address (Street Number and Name)		City or Town	State ZIP Code



Employer Completes Next Page







**Employment Eligibility Verification**  
**Department of Homeland Security**  
**U.S. Citizenship and Immigration Services**

**USCIS**  
**Form I-9**  
OMB No. 1615-0047  
Expires 10/31/2022

**Section 2. Employer or Authorized Representative Review and Verification**

(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")

<b>Employee Info from Section 1</b>	Last Name (Family Name)	First Name (Given Name)	M.I.	Citizenship/Immigration Status
<b>List A</b> Identity and Employment Authorization	<b>OR</b>	<b>List B</b> Identity	<b>AND</b>	<b>List C</b> Employment Authorization
Document Title		Document Title		Document Title
Issuing Authority		Issuing Authority		Issuing Authority
Document Number		Document Number		Document Number
Expiration Date (if any) (mm/dd/yyyy)		Expiration Date (if any) (mm/dd/yyyy)		Expiration Date (if any) (mm/dd/yyyy)
Document Title		<div>Additional Information</div> <div>QR Code - Sections 2 &amp; 3 Do Not Write In This Space</div>		
Issuing Authority				
Document Number				
Expiration Date (if any) (mm/dd/yyyy)				
Document Title				
Issuing Authority				
Document Number				
Expiration Date (if any) (mm/dd/yyyy)				
Document Title				
Issuing Authority				

**Certification:** I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment (mm/dd/yyyy): \_\_\_\_\_ (See instructions for exemptions)

Signature of Employer or Authorized Representative		Today's Date (mm/dd/yyyy)	Title of Employer or Authorized Representative	
Last Name of Employer or Authorized Representative		First Name of Employer or Authorized Representative		Employer's Business or Organization Name
Employer's Business or Organization Address (Street Number and Name)			City or Town	State ZIP Code

**Section 3. Reverification and Rehires (To be completed and signed by employer or authorized representative.)**

<b>A. New Name (if applicable)</b>			<b>B. Date of Rehire (if applicable)</b>
Last Name (Family Name)	First Name (Given Name)	Middle Initial	Date (mm/dd/yyyy)

**C.** If the employee's previous grant of employment authorization has expired, provide the information for the document or receipt that establishes continuing employment authorization in the space provided below.

Document Title	Document Number	Expiration Date (if any) (mm/dd/yyyy)
----------------	-----------------	---------------------------------------

**I attest, under penalty of perjury, that to the best of my knowledge, this employee is authorized to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.**

Signature of Employer or Authorized Representative	Today's Date (mm/dd/yyyy)	Name of Employer or Authorized Representative
--	---------------------------	---

## LISTS OF ACCEPTABLE DOCUMENTS

### All documents must be UNEXPIRED

Employees may present one selection from List A  
or a combination of one selection from List B and one selection from List C.

LIST A Documents that Establish Both Identity and Employment Authorization	OR	LIST B Documents that Establish Identity	AND LIST C Documents that Establish Employment Authorization
<ol style="list-style-type: none"> <li>1. U.S. Passport or U.S. Passport Card</li> <li>2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)</li> <li>3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa</li> <li>4. Employment Authorization Document that contains a photograph (Form I-766)</li> <li>5. For a nonimmigrant alien authorized to work for a specific employer because of his or her status:               <ol style="list-style-type: none"> <li>a. Foreign passport; and</li> <li>b. Form I-94 or Form I-94A that has the following:                   <ol style="list-style-type: none"> <li>(1) The same name as the passport; and</li> <li>(2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form.</li> </ol> </li> </ol> </li> <li>6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI</li> </ol>		<ol style="list-style-type: none"> <li>1. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address</li> <li>2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address</li> <li>3. School ID card with a photograph</li> <li>4. Voter's registration card</li> <li>5. U.S. Military card or draft record</li> <li>6. Military dependent's ID card</li> <li>7. U.S. Coast Guard Merchant Mariner Card</li> <li>8. Native American tribal document</li> <li>9. Driver's license issued by a Canadian government authority</li> <li>For persons under age 18 who are unable to present a document listed above:</li> <li>10. School record or report card</li> <li>11. Clinic, doctor, or hospital record</li> <li>12. Day-care or nursery school record</li> </ol>	<ol style="list-style-type: none"> <li>1. A Social Security Account Number card, unless the card includes one of the following restrictions:               <ol style="list-style-type: none"> <li>(1) NOT VALID FOR EMPLOYMENT</li> <li>(2) VALID FOR WORK ONLY WITH INS AUTHORIZATION</li> <li>(3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION</li> </ol> </li> <li>2. Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240)</li> <li>3. Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal</li> <li>4. Native American tribal document</li> <li>5. U.S. Citizen ID Card (Form I-197)</li> <li>6. Identification Card for Use of Resident Citizen in the United States (Form I-179)</li> <li>7. Employment authorization document issued by the Department of Homeland Security</li> </ol>

**Examples of many of these documents appear in the Handbook for Employers (M-274).**

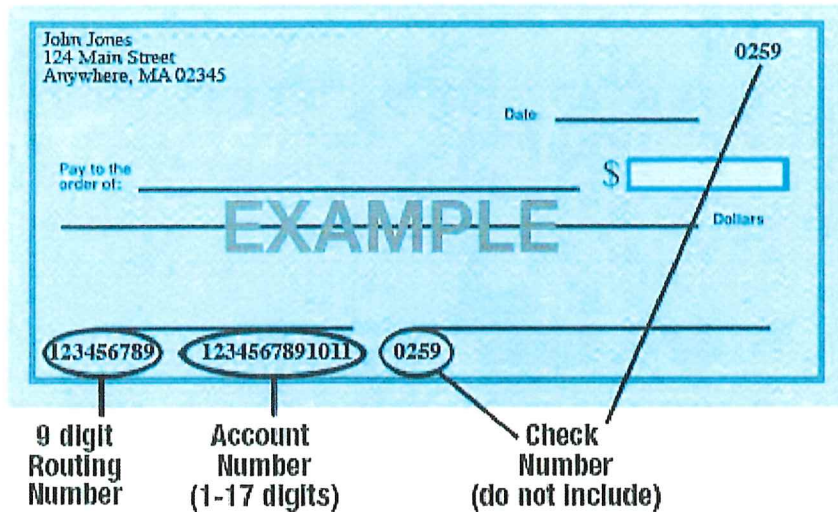
**Refer to the instructions for more information about acceptable receipts.**



## Direct Deposit Authorization Form

Please print and complete ALL the information below.

Employee Name: \_\_\_\_\_  
Employee Social Security #: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_



Name of Financial Institution: \_\_\_\_\_

Account #: \_\_\_\_\_

9-Digit Routing #: \_\_\_\_\_

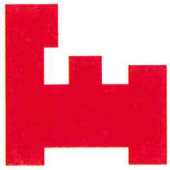
Type of Account:    Checking    Savings    (Circle One)

*Please attach a voided check for the bank account to which funds should be deposited.*

*Frazier School District* is hereby authorized to directly deposit my net pay in the account and financial institution indicated above. This authorization will remain in effect until I modify or cancel it in writing. Any such notification to my employer shall become effective following receipt, after a reasonable opportunity to act on it.

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_



Frazier School District  
Payroll Schedule  
2020-2021

PAY DATE	HOURS/DAYS WORKED		HOURS/DAYS WORKED		TIMESHEETS DUE TO BUILDING SECRETARY OR SUPERVISOR
	FROM ...	TO ...	FROM ...	TO ...	
September 4, 2020	August 8, 2020	August 21, 2020	August 21, 2020	August 21, 2020	August 21, 2020
September 18, 2020	August 22, 2020	September 4, 2020	September 4, 2020	September 4, 2020	September 4, 2020
October 2, 2020	September 5, 2020	September 18, 2020	September 18, 2020	September 18, 2020	September 18, 2020
October 16, 2020	September 19, 2020	October 2, 2020	October 2, 2020	October 2, 2020	October 2, 2020
October 30, 2020	October 3, 2020	October 16, 2020	October 16, 2020	October 16, 2020	October 16, 2020
November 13, 2020	October 17, 2020	October 30, 2020	October 30, 2020	October 30, 2020	October 30, 2020
November 27, 2020	October 31, 2020	November 13, 2020	November 13, 2020	November 13, 2020	November 13, 2020
December 11, 2020	November 14, 2020	November 27, 2020	November 27, 2020	November 27, 2020	November 27, 2020
December 25, 2020	November 28, 2020	December 11, 2020	December 11, 2020	December 11, 2020	December 11, 2020
January 8, 2021	December 12, 2020	December 25, 2020	December 25, 2020	December 25, 2020	December 25, 2020
January 22, 2021	December 26, 2020	January 8, 2021	January 8, 2021	January 8, 2021	January 8, 2021
February 5, 2021	January 9, 2021	January 22, 2021	January 22, 2021	January 22, 2021	January 22, 2021
February 19, 2021	January 23, 2021	February 5, 2021	February 5, 2021	February 5, 2021	February 5, 2021
March 5, 2021	February 6, 2021	February 19, 2021	February 19, 2021	February 19, 2021	February 19, 2021
March 19, 2021	February 20, 2021	March 5, 2021	March 5, 2021	March 5, 2021	March 5, 2021
April 2, 2021	March 6, 2021	March 19, 2021	March 19, 2021	March 19, 2021	March 19, 2021
April 16, 2021	March 20, 2021	April 2, 2021	April 2, 2021	April 2, 2021	April 2, 2021
April 30, 2021	April 3, 2021	April 16, 2021	April 16, 2021	April 16, 2021	April 16, 2021
May 14, 2021	April 17, 2021	April 30, 2021	April 30, 2021	April 30, 2021	April 30, 2021
May 28, 2021	May 1, 2021	May 14, 2021	May 14, 2021	May 14, 2021	May 14, 2021
June 11, 2021	May 15, 2021	May 28, 2021	May 28, 2021	May 28, 2021	May 28, 2021
June 25, 2021	May 29, 2021	June 11, 2021	June 11, 2021	June 11, 2021	June 11, 2021
July 9, 2021	June 12, 2021	June 25, 2021	June 25, 2021	June 25, 2021	June 25, 2021
July 23, 2021	June 26, 2021	July 9, 2021	July 9, 2021	July 9, 2021	July 9, 2021
August 6, 2021	July 10, 2021	July 23, 2021	July 23, 2021	July 23, 2021	July 23, 2021
August 20, 2021	July 24, 2021	August 6, 2021	August 6, 2021	August 6, 2021	August 6, 2021



**Frazier School District - Perryopolis (15473)**  
**YOUR WORKERS COMPENSATION CLAIMS ARE MANAGED BY WORKPARTNERS**  
 Send Bills To: PO Box 2971, Pittsburgh, PA 15230  
 Fax: (412) 454-8717  
 To Report a Claim Call: 1-800-633-1197  
 WC Policy: WC100-0006189-2014A  
 Policy Effective Date: 07/01/2014

**NOTICE TO EMPLOYEES IN CASE OF WORK-RELATED INJURIES**

1. If you suffer a work-related injury, your employer or its insurance company must pay for reasonable surgical and medical services and supplies, orthopedic appliances and prosthesis, including training in their use.
2. In order to insure that your medical treatment will be paid for by your employer or the insurance company, you must select from one of the following health care providers.
3. You must continue to visit one of the physicians listed below, if you need treatment, for ninety (90) days from the date of your first visit.
4. If one of the persons below refers you to another licensed specialist, your employer or their insurer will pay the bill for these services.
5. After this ninety- (90) day period, if you still need treatment and your employer has provided a list as set forth below, you may choose to go to another health care provider for treatment. You should notify your employer of this action within five days of your visit to said provider.
6. If a physician on the list prescribes invasive surgery, you may obtain a second opinion from any physician of your choice. If the second opinion is different than the listed physicians opinion, you may determine which course of treatment to follow; however, the second opinion must contain a specific and detailed treatment plan. If you choose the second opinion, the procedures in that opinion must be performed by one of the physicians on the list for the first ninety- (90) days. Therefore, in this situation, the employee may be required to treat with an employer-designated provider for up to 180 days.
7. If you are faced with a medical emergency, you may secure assistance from a hospital, physician, or health care provider of your choice for your work-related injury. However, when the emergency is resolved, you must seek treatment from a provider listed below.

<u>Name</u>	<u>Address</u>	<u>Scheduling</u>	<u>Area of Specialty</u>
Monongahela Valley Occupational Health	800 Plaza Dr, Ste 210 Belle Vernon, PA 15012	724-379-1940	Occupational Medicine
Excela Health WORKS - Norwin	8775 Norwin Ave, Ste 6 North Huntingdon, PA 15642	724-765-1230	Occupational Medicine
MedExpress Urgent Care - Belle Vernon	860 Rostraver Rd Belle Vernon, PA 15012	724-929-3278	Urgent Care
Mon-Vale Surgical Associates	800 Plaza Dr, Ste 140 Belle Vernon, PA 15012	724-929-4122	General Surgery
*UPP Dept of Neurosurgery - Belle Vernon	800 Plaza Dr, Ste 160 Belle Vernon, PA 15012	412-471-4772	Neurosurgery
The Orthopedic Group - Charleroi	625 Lincoln Ave, Ste 108 Charleroi, PA 15022	724-483-4880	Orthopedics
*Orthopaedic Specialists - UPMC - McKeesport	1500 Fifth Ave, Ste MA-42 A-Level Mansfield Building McKeesport, PA 15132	877-471-0935	Orthopedics
NeoVision EyeSight Center	305 Mckean Ave Charleroi, PA 15022	724-483-8065	Ophthalmology
Associates in Medical Rehabilitation	1163 Country Club Rd  Monongahela, PA 15063	724-258-1408	Physiatry (Musculoskeletal Injuries)
One Call Physical Therapy	Call Toll-Free for Closest Location	1-844-284-2525	Physical Therapy
One Call Chiropractic	Call Toll-Free for Closest Location	1-844-284-2525	Chiropractic
One Call Imaging Services	Call Toll-Free for Closest Location	1-844-284-2525	Diagnostic Imaging
One Call Durable Medical Equipment	Call Toll-Free for Supplier	1-844-284-2525	DME
Express Scripts	Call Toll-Free for Closest Location BIN# 003858, Group# KYHA	1-800-945-5951	Pharmacy

## WORKERS' COMPENSATION INFORMATION

To All Employees:

The workers' compensation law provides wage loss and medical benefits to employees who cannot work, or who need medical care, because of a work-related injury.

Benefits are required to be paid by your employer if self-insured, or through insurance provided by your employer. Your employer is required to post the name of the company responsible for paying workers' compensation benefits at its primary place of business and at its sites of employment in a prominent and easily accessible place. It is also required to be posted in any areas used for treatment of injured employees or for the administration of first aid.

You should report immediately any injury or work-related illness to your employer. Your benefits could be delayed or denied if you do not notify your employer immediately.

If your claim is denied by your employer, you have the right to request a hearing before a Workers' Compensation Judge.

The Bureau of Workers' Compensation cannot provide legal advice. However, you may contact the Bureau of Workers' Compensation for additional general information:

Bureau of Workers' Compensation  
1171 South Cameron Street, Room 103  
Harrisburg, Pennsylvania 17104-2501  
Telephone No. within Pennsylvania: 1-800-482-2383  
Telephone No. outside of this Commonwealth: 717-772-4447  
TTY: 1-800-362-4228 (for hearing and speech impaired only)  
[www.state.pa.us](http://www.state.pa.us), PA keyword: workers' comp

For a complete list of panel physicians, please contact your employer. Please call 1-800-633-1197 with any additional questions.

I, \_\_\_\_\_, employee of \_\_\_\_\_,  
(employer)

certify that I have been provided with, read, and understood the information set forth above consistent with the requirements of the Pennsylvania Workers' Compensation Act.

Date: \_\_\_\_\_

**Fax this form to WorkPartners (412-454-8717) if it is being completed as a result of a work injury; then place the original in the employee file. If this form is being completed for any reason other than in conjunction with an injury please do not fax to WorkPartners, only place in the employee file.**



## EMPLOYEE'S ACKNOWLEDGEMENT FORM UNDER SECTION 306(f)(1)(i) OF THE PENNSYLVANIA WORKER'S COMPENSATION ACT

I recognize and agree that my employer has provided a list of at least six (6) designated health care providers, no more than two (2) of whom are coordinated care organizations and no fewer than three (3) of whom are physicians. Therefore, I acknowledge that I must treat with one of these health care providers for ninety (90) days from the date of my first visit. If I fail to treat with one of these designated health care providers, I understand that my employer will not be liable for the payment for services rendered during this ninety (90) day period. Subsequent treatment may be provided by any health care provider of my choice. However, I must advise my employer within five (5) days of my first visit to each and every non-designated health care provider. Failure to do so may affect whether my employer is liable for payment for services rendered prior to appropriate notice.

My employer has informed me of my rights and duties, and my signature acknowledges that I have been so informed and that I understand my rights and duties.

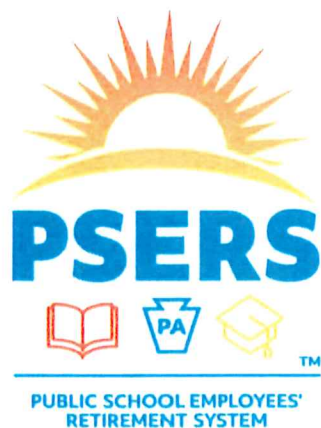
Employee's Signature \_\_\_\_\_ Date \_\_\_\_\_

Employee's Name (Print)	Employee Number
-------------------------	-----------------

Employer	Department
----------	------------

\_\_\_\_\_  
Witness' Signature Date

**Fax this form to WorkPartners (412-454-8717) if it is being completed as a result of a work injury; then place the original in the employee file. If this form is being completed for any reason other than in conjunction with an injury please do not fax to WorkPartners, only place in the employee file.**



# Information for New School Employees



## About PSERS

PSERS is a governmental, cost-sharing, multiple-employer pension plan to which public school employers, the Commonwealth, and school employees (members) contribute. Once you qualify for membership, you will have a defined benefit (DB) plan, a defined contribution (DC) plan, or a hybrid plan with both DB and DC components.

### PSERS Defined Benefit (DB) Plan

In the DB plan, the retirement benefit is based on a calculation. The calculation used by PSERS includes a pension multiplier, your credited years of service, and your final average salary. Class T-C, Class T-D, Class T-E, and Class T-F have only a DB component.



### PSERS Defined Contribution (DC) Plan

In the DC Plan, the retirement benefit is based on the amount of contributions made to the plan and the investment performance of those contributions. Your DC contributions and earnings, if any, are available for you to withdraw when you retire or leave employment. Class DC has only a DC component.



### Hybrid Plan

The hybrid plan consists of both DB and DC components. Class T-G and Class T-H have both DB and DC components.

## With PSERS, you're on your way!

The Public School Employees' Retirement System (PSERS) and your school employer have partnered to assist you with planning and saving for your retirement.

When you become a PSERS member, you join one of the nation's largest public pension funds. That means you're now in good company with more than 500,000 fellow PSERS members.

PSERS has been proudly serving Pennsylvania public school employees for the past 100 years. Last year alone, PSERS disbursed more than \$6.6 billion to retirees. When it's your turn to retire, you can count on PSERS to be there for you and your retirement journey.

## Questions?

### PSERS Retirement Plan Information:

5 N 5th Street | Harrisburg PA 17101-1905  
Toll-Free: 1.888.773.7748 (8 a.m. - 5 p.m., M-F)  
Harrisburg Local: 717.787.8540  
Contact [PSERS@pa.gov](mailto:PSERS@pa.gov) | [psers.pa.gov](http://psers.pa.gov)

### PSERS DC Plan Information:

Toll-Free: 1.833.432.6627 (8 a.m. - 8 p.m., M-F)  
Participant Web: [PSERSDC.voya.com](http://PSERSDC.voya.com)



## Qualifying for PSERS Membership

All full-time employees must become members of PSERS and must make retirement contributions starting their first day of employment. "Full-time," for retirement purposes with PSERS, is defined as employees who work 5 or more hours a day/5 days a week or its equivalent (25 or more hours a week), even if your employer considers you to be part-time.

Part-time salaried employees qualify for PSERS membership as of their first day of employment and must have retirement contributions withheld.

Part-time hourly and part-time per diem employees must meet minimum service requirements to qualify for PSERS membership (500 hours or 80 days). Once you meet membership requirements, subsequent service for any school employer is qualified service unless there is a break in membership. Refer to *PSERS Active Member Handbook* for more information.

Part-time employees may waive membership in PSERS. To qualify for the waiver, a part-time employee must have an Individual Retirement Account and request a waiver within 90 days of notification from PSERS that they qualify for PSERS membership. When you waive membership in PSERS, you forfeit all future rights to benefits for the waived time period.

## Membership Class of Service

For school employees who become new members of PSERS on or after July 1, 2019, there are three membership classes that govern your retirement contribution amounts and future benefits with PSERS: Class T-G, Class T-H, and Class DC. New members are automatically enrolled as Class T-G, but have a one-time opportunity to elect Class T-H or Class DC membership. Look for class election material from PSERS when your election period is open either through your PSERS Member Self-Service (MSS) account if you sign up or in the mail if you did not sign up for MSS.

## Withheld Contributions

If you are a full-time or part-time salaried employee, your employer will begin withholding DB and DC contributions from your first day of work. The amount withheld is determined by your membership class. Full-time and part-time salaried employees who first qualify on or after July 1, 2019, and remain in Class T-G, will have 8.25% withheld for both the DB and DC components of their retirement.

If you are a part-time hourly or per diem employee, your employer may withhold contributions for the DB component which is 5.50%. The amount withheld will be returned to you if you do not qualify for membership. DC contributions cannot be withheld until you qualify for membership. Once you meet PSERS membership eligibility requirements, your employer must withhold both DB and DC contributions.

If you previously were a PSERS member, you will remain in your previous membership class and your employer may withhold contributions at the rate for that class.

## Retired Members Returning to Service

The Retirement Code prohibits retirees from working for a public school in any capacity, full-time or part-time, qualifying or non-qualifying service, while receiving a PSERS retirement benefit. If you are a PSERS retiree and return to Pennsylvania public school service as a school employee, your monthly retirement benefit will be stopped unless a return to service exception applies. Please visit the PSERS website or contact PSERS for more information.

## Your Responsibilities

Please refer to **PSERS website for PSERS Active Member Handbook and other detailed information.**

- ✓ **Read PSERS Communications:** Once qualified, new members will receive some important items such as the *Welcome Packet* and *Class Election Packet (if applicable)*. If you have a PSERS Member Self-Service (MSS) account, you are automatically enrolled in *Paperless Delivery* which means that PSERS will deliver information to you electronically instead of through physical mail. You should check your account periodically to ensure you do not miss important information.
- ✓ **Nominate and Maintain Beneficiaries:** A beneficiary is the person(s) or entity(ies) you wish to receive your retirement benefits upon your death. You may nominate and change your beneficiary nomination electronically at any time through the MSS Portal. Alternatively, you may submit a *Nomination of Beneficiaries (PSRS-187)* form to PSERS. Please note that your most recently submitted *Nomination of Beneficiaries* will supersede previous nominations.
- ✓ **Review information on PSERS website and take advantage of available resources such as free Foundations for Your Future (FFYF) programs conducted by PSERS retirement representatives.**
- ✓ **Keep your email and mailing address current through the MSS Portal.**

Attached is the 2020 Plan Summary for Frazier School District from TSA Consulting Group, Inc. If you have any questions on your existing TSA plan contribution, or are interested in establishing one, please contact the appropriate vendor or representative below.

Cynthia L. Egan  
Senior Financial Advisor  
[CEgan@lincolninvestment.com](mailto:CEgan@lincolninvestment.com)

**Lincoln Investment**

30 Isabella Street, Suite 204  
Pittsburgh, PA 15212  
412-231-7960 (Direct)  
412-231-7968 (FAX)  
1-800-242-1421 X5527

Kyle Bero  
Financial Professional  
[kyle.bero@equitable.com](mailto:kyle.bero@equitable.com)  
**Equitable (AXA Advisors, LLC)**  
150 W. Beau St  
Suite 116  
Washington, PA 15301  
Tel: (724) 222-6409  
Cell: (724) 317-6954

Douglas S. Waszo  
Financial Advisor  
[dwaszo@4kmc.com](mailto:dwaszo@4kmc.com)  
[www.4kmc.com](http://www.4kmc.com)  
**Kades-Margolis**  
One Northgate Square Ste. 102  
Greensburg, PA 15601  
Phone: 724-836-2800  
Fax: 724-836-5800

Wyndham Murray  
Senior Account Manager  
[Wyndham.Murray@americanfidelity.com](mailto:Wyndham.Murray@americanfidelity.com)  
**American Fidelity Assurance Company**  
9000 Cameron Parkway  
Oklahoma City, OK 73114  
Phone: 877-518-2337 x2767  
Fax: 844-565-2235

**Invesco Oppenheimer Funds**  
(800) 959-4246

**Security Benefit Group**  
(800) 888-2461



## MEANINGFUL NOTICE / PLAN SUMMARY INFORMATION 2020

Frazier School District, PA

### 403(b) PLAN

The 403(b) Plan is a valuable retirement savings option. This notice provides a brief explanation of the provisions, policies and rules that govern the 403(b) Plan offered.

Plan administration services for the 403(b) plan are provided by TSA Consulting Group, Inc. (TSACG). Visit the TSACG website (<https://www.tsacg.com>) for information about enrollment in the plan, investment product providers available, distributions, enrollment, exchanges or transfers, 403(b) loans, and rollovers.

### ELIGIBILITY

Most employees, with the exception of private contractors, appointed/elected trustees and/or school board members and student workers, are eligible to participate in the 403(b) plan immediately upon employment. Employees may make voluntary elective deferrals to the 403(b) plan. Participants are fully vested in their contributions and earnings at all times.

### EMPLOYEE CONTRIBUTIONS

#### Traditional 403(b)

Upon enrollment, participants designate a portion of their salary that they wish to contribute to their traditional 403(b) account up to their maximum annual contribution amount on a pre-tax basis, thus reducing the participant's taxable income. Salary deferral contributions to the participant's 403(b) account are made from income paid through the employer's payroll system. Taxes on contributions and any earnings are deferred until the participant withdraws their funds.

#### Roth 403(b)

Contributions made to a Roth 403(b) account are after-tax deductions from your paycheck. Income taxes are not reduced by contributions you make to your account. All qualified distributions from Roth 403(b) accounts are tax-free. Any earnings on your deposits are not taxed as long as they remain in your account for five years from the date that your first Roth contribution was made. Distributions may be taken if you are 59½ (subject to plan document provisions) or at separation from service.

The Internal Revenue Service regulations limit the amount participants may contribute annually to tax-advantaged retirement plans and imposes substantial penalties for violating contribution limits. TSACG monitors 403(b) plan contributions and notifies the employer in the event of an excess contribution.

### THE BASIC CONTRIBUTION LIMIT FOR 2020 IS \$19,500.

Additional provisions allowed:

### AGE-BASED ADDITIONAL AMOUNT

Participants who are age 50 or older any time during the year qualify to make an additional contribution of up to \$6,500.

### THE SERVICE-BASED CATCH UP AMOUNT

The special catch-up provision allows participants to make additional contributions of up to \$3,000 if, as of the preceding calendar year, the participant has completed 15 or more full years of employment with the current employer, not averaged over \$5,000 per year in annual contributions, and has not utilized catch-up contributions in excess of the aggregate of \$15,000. For a detailed explanation of this provision, please visit <https://www.tsacg.com>.

### ENROLLMENT

Employees who wish to enroll in the 403(b) plan must first select the provider and investment product best suited for their 403(b) account. Upon establishment of the account with the selected provider, a "Salary Reduction Agreement" (SRA) form and any disclosure forms must be completed and submitted to the employer. This form authorizes the employer to withhold 403(b) contributions from the employee's pay and send those funds to the Investment Provider on their behalf. A SRA must be completed to start, stop or modify contributions to a 403(b) account. Unless otherwise notified by your employer, you may enroll and/or make changes to your current contributions anytime throughout the year.

*Please note: The total annual amount of a participant's contributions must not exceed the Maximum Allowable Contribution (MAC) calculation. For convenience, a MAC calculator is available at <https://www.tsacg.com>.*





## INVESTMENT PROVIDER INFORMATION

A current list of authorized 403(b) Investment Providers and current employer forms are available on the employer's specific Web page at <https://www.tsacg.com>.

## PLAN DISTRIBUTION TRANSACTIONS

Distribution transactions may include any of the following depending on the employer's Plan Document: loans, transfers, rollovers, exchanges, hardships, unforeseen financial emergency withdrawals or distributions. Participants may request these distributions by completing the necessary forms obtained from the provider and plan administrator as required. All completed forms should be submitted to the plan administrator for processing.

## PLAN-TO-PLAN TRANSFERS

A plan-to-plan transfer is defined as the movement of a 403(b) account from a previous plan sponsor's plan and retaining the same account with the authorized investment provider under the new plan sponsor's plan.

## ROLLOVERS

Participants may move funds from one qualified plan account, i.e. 403(b) account, 401(k) account or an IRA, to another qualified plan account at age 59½ or when separated from service. Rollovers do not create a taxable event.

## DISTRIBUTIONS

Retirement plan distributions are restricted by IRS regulations. A participant may not take a distribution of 403(b) plan accumulations without penalty unless they have attained age 59½ or separated from service in the year in which they turn 55 or older. In most cases, any withdrawals made from a 403(b) account are taxable in full as ordinary income.

## EXCHANGES

Participants may exchange account accumulations from one 403(b) investment provider to another 403(b) investment provider that is authorized under the plan; however, there may be limitations affecting exchanges, and participants should be aware of any charges or penalties that may exist in individual investment contracts prior to exchange.

## 403(b) PLAN LOANS

Participants may be eligible to borrow their 403(b) plan accumulations depending on the provisions of their 403(b) account contract and provisions of the employer plan. If loans are available, they are generally granted for a term of five years or less (general-purpose loans). Loans taken to purchase a principal residence can extend the term beyond five years depending on the provisions of their 403(b) account contract and provisions of the employer. Details and terms of the loan are established by the provider. Participants must repay their loans through monthly payments as directed by the provider. Prior to taking a loan, participants should consult a tax advisor.

## HARDSHIP WITHDRAWALS

Participants may be able to take a hardship withdrawal in the event of an immediate and heavy financial need. To be eligible for a hardship withdrawal according to IRS Safe Harbor regulations, you must verify and provide evidence that the distribution is being taken for specific reasons. These eligibility requirements to receive a Hardship withdrawal are provided on the Hardship Withdrawal Disclosure form at <https://www.tsacg.com>.

## EMPLOYEE INFORMATION STATEMENT

Participants in defined contribution plans are responsible for determining which, if any, investment vehicles best serve their retirement objectives. The 403(b) plan assets are invested solely in accordance with the participant's instructions. The participant should periodically review whether his/her objectives are being met, and if the objectives have changed, the participant should make the appropriate changes. Careful planning with a tax advisor or financial planner may help to ensure that the supplemental retirement savings plan meets the participant's objectives.

## PLAN ADMINISTRATOR CONTACT INFORMATION

### Transactions

P.O. Box 4037  
Fort Walton Beach, FL 32549  
Toll-free: 1-888-796-3786  
Toll-free fax: 1-866-741-0645  
<https://www.tsacg.com>



### For overnight deliveries

73 Eglin Parkway NE, Suite 202  
Fort Walton Beach, FL 32548  
Toll-free: 1-888-796-3786  
Toll-free fax: 1-866-741-0645  
<https://www.tsacg.com>





# Frazier School District

Mr. William R. Henderson, III, Superintendent

142 Constitution Street  
Perryopolis, PA 15473  
(724) 736-4432

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## Confidentiality Agreement

It is the policy of Frazier School District to provide our employees or students with a level of privacy and confidentiality with any information concerning any of our employees or students.

In the course of your work, you may have access to confidential information (oral, written or computer generated not otherwise available to the public at large) about employees or students, their families and/or personal business. School business information includes computer programs, software and supporting documentation, technology improvement plans, strategy plans, financial information and employee information (including but not limited to co-workers and their families).

THEREFORE, I AGREE that:

My right to enter or make use of confidential information is restricted to my need to know the data or information to perform my job responsibilities. I will keep my computer access password(s) confidential. If another method of accessing a computer system is used, I will restrict its use to myself. I will not discuss any confidential information in any public areas, hallways, gathering spaces, etc.

I will hold all confidential information of which I have knowledge in the truest confidence, as required by law. I agree to utilize confidential information obtained by me for the benefit of the employee or student or in performance of my job responsibilities.

Unauthorized disclosure, copying and/or misuse of confidential information is a serious breach of duty and will result in disciplinary action up to and including termination of employment or contract with Frazier School District. Further, this agreement mandates compliance extending beyond employment, contract, or association with Frazier School District as required by law.

I HAVE READ THIS CONFIDENTIALITY AGREEMENT AND AGREE TO ITS TERMS.

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Employee Name (PRINT)

---

Employee Signature

---

Date

Please note, required notices and additional information about Frazier School District's current healthcare plans can be found on the IU1 Consortium website. Please visit [www.iu1.org/departments/business-services/healthcare-consortium/healthcare-resources-for-frazier-school-district](http://www.iu1.org/departments/business-services/healthcare-consortium/healthcare-resources-for-frazier-school-district) for this information.





**Intermediate Unit #1**  
**Health Care Consortium**

**ENROLLMENT/CHANGE FORM**

**SECTION I - TO BE COMPLETED BY EMPLOYEE/RETIREE**

Use this form to select/change a medical, dental and/or vision plan and coverage level. **Return this completed form within 31 days of your full-time date of hire or qualifying event, along with any required documentation i.e. marriage certificate, birth certificate, etc.**

Reason For Completing This Enrollment Form: ☐ New Hire ☐ Current Employee Enrolling ☐ Change

Type of change: ☐ Address ☐ Name ☐ Add Spouse/Dependent ☐ Remove Spouse/Dependent

Hire Date: \_\_\_\_\_ Benefit Type (check all that apply): ☐ Medical ☐ Dental ☐ Vision

Name (First, Middle, Last)	Social Security Number	Date of Birth	Male/Female	Add or Drop
Employee/Retiree			<input type="checkbox"/> M <input type="checkbox"/> F	
Spouse			<input type="checkbox"/> M <input type="checkbox"/> F	
Dep			<input type="checkbox"/> M <input type="checkbox"/> F	
Dep			<input type="checkbox"/> M <input type="checkbox"/> F	
Dep			<input type="checkbox"/> M <input type="checkbox"/> F	

Street Address

City

State

Zip Code

**Required Documentation** Provide the required document along with this form. Refer to the Instructions for Benefit Elections/Changes to determine what documents you need to provide. Your benefits will not be updated until all documentation is received.

*I certify that the above information is true and correct. For New Hire: By not enrolling in certain benefits at this time (within 31 days of full-time date of hire or within 31 days of a qualifying change in family status), I understand that I will be unable to enroll or make changes again until the next annual Open Enrollment period.*

Signature of Employee/Retiree: \_\_\_\_\_

Date: \_\_\_\_\_

**SECTION II - TO BE COMPLETED BY SCHOOL DISTRICT**

District:			Representative:
Effective Date of Change:			Date Section I Received:
Group #s	Old (if applicable)	New	Coverage Level/Tier
Medical			<input type="checkbox"/> EE <input type="checkbox"/> EE+CH <input type="checkbox"/> EE+CHN <input type="checkbox"/> EE+SP <input type="checkbox"/> FAM
Dental			<input type="checkbox"/> EE <input type="checkbox"/> EE+CH <input type="checkbox"/> EE+CHN <input type="checkbox"/> EE+SP <input type="checkbox"/> FAM
Vision			<input type="checkbox"/> EE <input type="checkbox"/> EE+CH <input type="checkbox"/> EE+CHN <input type="checkbox"/> EE+SP <input type="checkbox"/> FAM

**Type of Activity (check all that apply):**

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> New Hire                   | <input type="checkbox"/> Remove Spouse/Dependent   | <input type="checkbox"/> COBRA (check all that apply and<br>indicate Qualifying Event below)<br><input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision |
| <input type="checkbox"/> Current Employee Enrolling | <input type="checkbox"/> Change of Address         |  |
| <input type="checkbox"/> Termination                | <input type="checkbox"/> Name Change               |  |
| <input type="checkbox"/> Add Spouse/Dependent       | <input type="checkbox"/> Act 110 / Act 43 Eligible |  |

**Qualifying Event or Change of Family Status:**

- |                                     |  |  |
|-------------------------------------|--|--|
| <input type="checkbox"/> Newborn    | <input type="checkbox"/> Death                   | <input type="checkbox"/> Over Age Dependent<br><input type="checkbox"/> Medicare Entitlement<br><input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Adoption   | <input type="checkbox"/> Voluntary Resignation   |  |
| <input type="checkbox"/> Retirement | <input type="checkbox"/> Involuntary Resignation |  |
| <input type="checkbox"/> Marriage   | <input type="checkbox"/> Legal Guardianship      |  |
| <input type="checkbox"/> Divorce    | <input type="checkbox"/> Court Ordered           |  |

**Required documentation must be collected, reviewed and approved by district prior to enrollment. DO NOT send documentation to ReSo; keep at district for auditing purposes.**

Signature of District Rep: \_\_\_\_\_

Date: \_\_\_\_\_

-required for processing -

**FRAZIER SCHOOL DISTRICT**  
**Business Office**

**Medical Insurance**

All Married Couples

The parties hereto agree that if an employee entitled to the health insurance benefits set forth above is also insured by the same or a similar plan elsewhere, that employee shall so notify the District of that fact and make an election as to the insurance plan with which he/she will choose to be insured.

Employees covered by a spouse's insurance or other insurance coverage for Blue Cross/Select Blue may choose not to be in the insurance program offered by the District. Employees making such a choice shall receive two hundred dollars (\$200) per month through payroll in lieu of Family or Husband and Wife coverage as long as they have access to the same or similar coverage.

If spouse is employed, please complete the following:

_____	Name of Employee
_____	Name of Employer
_____	Address of Employer
_____	
_____	
_____	Telephone number of Employer
_____	Name of Plan
_____	Account Number of Plan
_____	Does not have medical coverage

\_\_\_\_\_ I elect to keep my family coverage with Frazier School District because my spouse does not have the same or a similar plan offered to them.

\_\_\_\_\_ I elect to receive \$200.00 per month through payroll in lieu of Family or Husband and Wife coverage. We have access to the same or similar coverage.

I hereby verify the statements set forth in this form are true and correct to the best of my knowledge, information and belief.

Date: \_\_\_\_\_

Signature \_\_\_\_\_



# ATTENTION

## Re: ID card requests

When employees have lost or misplaced their ID cards, please have them call the customer service numbers provided below to request new cards. Web sites are also listed where cards can be ordered. These numbers and web sites should also be used when additional ID cards are needed for dependents.

HIGHMARK Medical and Vision Card  
[www.highmarkbcbs.com](http://www.highmarkbcbs.com)

1-800-241-5704

UCCI Dental  
[www.ucci.com](http://www.ucci.com)

1-800-332-0366

Davis Vision  
[www.davisvisionpa.com](http://www.davisvisionpa.com)

1-800-783-6872



**GROUP INSURANCE ENROLLMENT FORM**  
**Unum Life Insurance Company of America**  
2211 Congress Street, Portland, ME 04122

Please print legibly and complete this form in its entirety. Blank fields will cause significant delays in processing.

Policyholder Name															Policy No.					Division No.								
F	R	A	Z	I	E	R	S	C	H	O	O	L	D	I	S	T	R	I	C	2	1	4	9	4	5	0	0	1
Employee Social Security Number										Gender		Date of Birth (mm/dd/yyyy)					Hours Worked Per Week											
										M	F																	
Employee First Name										M.I.	Last Name																	
Employee Street Address										City					State		Zip Code											
Original Date of Hire					Annual Salary					Occupation																		
										\$																		
										<input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt																		
<input type="checkbox"/> Date entered into an eligible class (ex: part time to full time) or																												
<input type="checkbox"/> Rehire Date or																												
<input type="checkbox"/> Date of promotion to an eligible class										Spouse First Name (if coverage is selected)										Spouse Date of Birth (mm/dd/yyyy)								

**COVERAGE ELECTIONS:** Your employer will inform you of available coverage. Check yes to enroll; check no if you decline or coverage is not available.

**Life/AD&D** ☐ Yes ☒ No **Dependent Life** ☐ Yes ☒ No **LTD** ☒ Yes ☐ No **STD** ☒ Yes ☐ No

**AMOUNT OF COVERAGE SELECTED FOR:**

**LIFE/AD&D** You: \$   ,     ,      Spouse: \$   ,          Child: \$   ,

Note: If you have chosen coverage over the Guarantee Issue amount for you or your spouse, you will also need to complete an Evidence of Insurability form. The amount of coverage over your Guarantee Issue amount will be subject to medical underwriting and will become effective on the first of the month coincident with or next following the date Unum approves your Evidence of Insurability form. If you **DO NOT APPLY FOR** coverage for you or your dependent (s) during your or their initial enrollment period, you will need to complete an Evidence of Insurability form for all amounts of coverage. You may complete and electronically submit an Evidence of Insurability form—please see your Plan Administrator.

**Beneficiary Information:**

<b>Name (last name, first, middle initial):</b>	<b>Relation to You:</b>	<b>Benefit %:</b>
<b>If the beneficiary(ies) named above are not living, then pay:</b>		

**Request for Signature and Certification:** I understand that my coverage may be subject to exclusions, limitations, delayed effective dates and benefit offsets, as described in the enrollment materials or employee booklet(s) that have been provided to me by my employer. I certify that all statements are true to the best of my knowledge and belief and I understand that a copy of this form will be made available to me at my request. I authorize my employer to make the necessary deductions from my salary or wages to pay the premium when my insurance becomes effective. I understand that my payroll deduction amount will change if my coverage or costs change.

\_\_\_\_\_  
Employee Signature Date Work Phone Home Phone

Unum is a registered trademark and marketing brand of Unum Group and its insuring subsidiaries.

AE-1107

RETAIN A COPY OF THIS FORM FOR YOUR RECORDS AND SEND A COPY TO YOUR EMPLOYER



# Employee Application

Please print clearly in blue or black ink.

## ISSUE

Check one – Employer Use

☐ New Employee ☐ Change ☐ COBRA

**Employee Information** – Failure to accurately complete the questions on this application may affect the existence or amount of coverage. Please correct any errors in the information listed below.

Employee name (last, first, initial)	Employer	Employment location
--------------------------------------	----------	---------------------

Group policy/participant #	Account # or Bill Group Name	Cert. #	Employee SSN	Employee birthdate
----------------------------	------------------------------	---------	--------------	--------------------

Sex <input type="checkbox"/> M <input type="checkbox"/> F	Job title or position	Employee hire date	# hours per week	Earnings \$ _____ <input type="checkbox"/> Hourly <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Yearly <input type="checkbox"/> Other _____	Married <input type="checkbox"/> Yes <input type="checkbox"/> No	Children <input type="checkbox"/> Yes <input type="checkbox"/> No
---	-----------------------	--------------------	------------------	--	--	---

Address	City	State	Zip
---------	------	-------	-----

ELECTIONS ARE NOT VALID WITHOUT A SIGNATURE AT THE END OF THIS APPLICATION.

## Dependent Information – Required if Dependent coverage applies

Name (Last name, First Name)	Date of Birth	Gender	Relationship
------------------------------	---------------	--------	--------------


**NOTE** – Coverage not elected will be assumed refused even if not specifically refused

## Benefits

You may select the benefits below.

<input type="checkbox"/> Employee Life	<input type="checkbox"/> Voluntary Life    Amount Electing _____ Have you used tobacco in any form in the last 12 months? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Employee AD&D	<input type="checkbox"/> Voluntary AD&D    Amount Electing _____
<input type="checkbox"/> Dependent Life	<input type="checkbox"/> Voluntary Spouse Amount Electing _____ Name of Spouse _____ Date of birth _____ Has your spouse used tobacco in any form in the last 12 months? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Short Term Disability	<input type="checkbox"/> Voluntary Child <input type="checkbox"/> \$1,000 <input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000
<input type="checkbox"/> Long Term Disability	<input type="checkbox"/> Voluntary STD    Amount Electing _____
<input type="checkbox"/> Dental – Employee	<input type="checkbox"/> Voluntary LTD    Amount Electing _____

- ☐ Dental – Employee + Spouse  
☐ Dental – Employee + Child(ren)  
☐ Dental – Employee + Family

Were you covered under another dental plan within the last 31 days? ☐ Yes ☐ No

If "Yes," termination date \_\_\_\_\_ Reason for termination of coverage \_\_\_\_\_

☐ Vision – Employee

☐ Vision – Employee + Spouse

☐ Vision – Employee + Child(ren)

☐ Vision – Employee + Family

☐ Critical Illness: ☐ Level 1 ☐ Level 2 (includes cancer option)

☐ Employee Critical Illness Amount Electing \_\_\_\_\_

Have you used tobacco in any form in the past 12 months? ☐ Yes ☐ No

☐ Spouse Critical Illness Amount Electing \_\_\_\_\_

Has your spouse used tobacco in any form in the past 12 months? ☐ Yes ☐ No

☐ Child(ren) Critical Illness Amount Electing \_\_\_\_\_

☐ Cancer: ☐ Level 1 ☐ Level 2

☐ Employee ☐ Employee + Spouse ☐ Employee + Child(ren) ☐ Family

Have you used tobacco, in any form in the past 12 months? ☐ Yes ☐ No

☐ Accident ☐ Employee

☐ Spouse - Include Spouse Off the Job Disability Benefit? ☐ Yes ☐ No

☐ Child(ren)

**Beneficiaries** - Applies to all coverages for which a beneficiary designation is required

Last Name First MI Relationship

☐ Primary  
☐ Secondary

☐ Primary  
☐ Secondary

If beneficiary is not related to you, please provide Date of Birth, Social Security Number, and full address.

- 1) Give FULL names and relationships of each beneficiary.
- 2) Beneficiaries elected will apply to all coverage elected on this form for which a beneficiary designation is required.
- 3) If primary/secondary election is not noted, the beneficiary will be considered primary.
- 4) Proceeds will be paid in equal shares to those primary beneficiaries who survive you. If no primary beneficiaries survive you, the proceeds will be paid in equal shares to the surviving secondary beneficiaries.
- 5) If your designation does not fit in the above arrangement, or you want to specify a beneficiary by coverage, please contact Union Security Insurance Company for the appropriate forms.

**MY SIGNATURE ON THIS APPLICATION CERTIFIES THAT I:**

- (1) Apply for the coverages designated for which I am eligible under my employer's plan with Union Security Insurance Company.
- (2) Understand if coverages have been refused, I am not entitled to benefits under those coverages and that if I want to apply later, I must furnish at my own expense proof of good health satisfactory to Union Security Insurance Company. For Dental coverage, I understand that I will not be entitled to benefits until the expiration of any Late Entrant Limitation period specified in the policy.
- (3) Authorize any required deductions from my earnings.
- (4) Designate the beneficiary named on this application to receive any benefits payable in the event of my death.
- (5) Represent that all of the information on this application is complete, correct and true to the best of my knowledge and belief.
- (6) Understand that I must be actively at work the number of hours specified in the policy/participation agreement to remain insured.
- (7) Understand that I have the right to select any dental care provider of my choice.



- (8) Understand that the dental plan includes a pre-estimate provision that will advise me in advance of the benefits I may be eligible for if the procedure is performed.
- (9) Understand that coverages include waiting periods, limitations, and exclusions and a pre-existing conditions provision that may affect my entitlement to benefits.

**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 subjects such person to criminal and civil penalties.**

Employee's signature \_\_\_\_\_ Date \_\_\_\_\_

AGENT, BROKER, AND/OR ENROLLER INFORMATION:

Agency Name: \_\_\_\_\_

Agent/Broker Name: \_\_\_\_\_

Enroller Name: \_\_\_\_\_

IF SIGNIFICANT REACTION WAS REPORTED, THE PHYSICIAN REPORT MUST STATE THAT THE APPLICANT IS FREE FROM CURRENT TUBERCULOSIS DISEASE OR IS UNDER ADEQUATE CHEMOTHERAPY FOR TUBERCULOSIS DISEASE:



**IV. Significant Medical Conditions (✓)**

	Yes	No	If Yes, Explain:
Allergies .....	<input type="checkbox"/>	<input type="checkbox"/>	
Asthma .....	<input type="checkbox"/>	<input type="checkbox"/>	
Cardiac .....	<input type="checkbox"/>	<input type="checkbox"/>	
Chemical Dependency .....	<input type="checkbox"/>	<input type="checkbox"/>	
Drugs.....	<input type="checkbox"/>	<input type="checkbox"/>	
Alcohol.....	<input type="checkbox"/>	<input type="checkbox"/>	
Diabetes Mellitus .....	<input type="checkbox"/>	<input type="checkbox"/>	
Gastrointestinal Disorder .....	<input type="checkbox"/>	<input type="checkbox"/>	
Hearing Disorder.....	<input type="checkbox"/>	<input type="checkbox"/>	
Hypertension .....	<input type="checkbox"/>	<input type="checkbox"/>	
Neuromuscular Disorder .....	<input type="checkbox"/>	<input type="checkbox"/>	
Orthopedic Condition.....	<input type="checkbox"/>	<input type="checkbox"/>	
Respiratory Illness.....	<input type="checkbox"/>	<input type="checkbox"/>	
Seizure Disorder.....	<input type="checkbox"/>	<input type="checkbox"/>	
Skin Disorder .....	<input type="checkbox"/>	<input type="checkbox"/>	
Vision Disorder .....	<input type="checkbox"/>	<input type="checkbox"/>	
Other (Specify).....	<input type="checkbox"/>	<input type="checkbox"/>	

**V. Report of Physical Examination (✓)**

	NORMAL	ABNORMAL	NOT EXAMINED	COMMENTS
Height (inches) _____				
Weight (pounds) _____				
Pulse _____				
Blood Pressure _____				
Hair/Scalp				
Skin				
Eyes – Visual Acuity: R _____ L _____				
Eyes – Color Vision				
Ears – Hearing (dB) R _____ L _____				
Nose and Throat				
Teeth and Gingiva				
Lymph Glands				
Heart – Murmur, etc...				
Lungs – Adventitious Findings				
Abdomen				
Genitourinary				
Neuromuscular System				
Extremities				

Are there any special medical problems or chronic diseases which require restriction of activity, medication or which might affect his/her work role? If so, specify \_\_\_\_\_

\_\_\_\_\_  
Physician Name (Print)\_\_\_\_\_  
Signature of Examiner\_\_\_\_\_  
Date\_\_\_\_\_  
Physician Address

The statements and answers as recorded above are full, complete and true to the best of my knowledge and belief. I understand that any false or misleading statements may cause termination of my employment.

I authorize the physician or other person to disclose any knowledge or information pertaining to my health to the employing authority for whom this examination is performed.

\_\_\_\_\_  
Signature of Employee\_\_\_\_\_  
Date