

Some overpayments of Paid Leave Oregon benefits are eligible for forgiveness if paying the benefits back would cause financial hardship for you. If we approve your request for an overpayment waiver, we will cancel your remaining debt and stop all collection efforts on all eligible balances.

We consider repayment to be a financial hardship if at least 90% of a household's income is spent on basic living expenses. We assume a claimant's expenses are the same as the combined total of the Internal Revenue Service's national and local standards for food, clothing, health care, housing and utilities, and transportation.

Use this form to request that we forgive, or waive, your overpayment. You will want to finish filling out this form as soon as possible, as overpayment waivers are not retroactive. This means we don't give back any payments you make on the debt before we approve your waiver.

We will send you a written decision after we review your request. It will include instructions for how to appeal the decision, if it's denied.

Instructions:

- Complete this form in black or blue ink.
- Make sure responses are legible.
- You must sign and date the form for us to process it.

Provide proof of all income. This includes income for everyone you listed as part of your household. You must submit supporting documents with your application. Failure to include them may result in a denial of the waiver (*examples of supporting documents start on page 4*).

CONTACT INFORMATION

Legal first name:

Legal last name(s):

Social Security Number (SSN): _____ or

Individual Taxpayer Identification Number (ITIN):

Phone number: (____) ____ - _____

Email address:

Name:		SSN/ITIN:	
PHYSICAL ADDRESS			
Street line 1:			
Street line 2:			
Unit type:		Unit number:	
City:		State:	Zip:
County:		Country:	
Attention:			
MAILING ADDRESS <i>(If different from physical address)</i>			
Street line 1:			
Street line 2:			
Unit type:		Unit number:	
City:		State:	Zip:
County:		Country:	
Attention:			
WHO IS IN YOUR HOUSEHOLD?			
<p>Your “household” includes yourself, your spouse or domestic partner, and your children or dependents.</p> <p>If you rent from someone, only include your household’s income <i>(outlined above)</i>. If you are living with your parents or relatives or have roommates, you do not need to include their income unless they are considered a spouse, domestic partner, or dependent.</p>			
HOUSEHOLD INFORMATION			
List all the people in your household, including yourself .			
WE WILL NEED PROOF OF INCOME FOR ALL PEOPLE LISTED BELOW. If you need to add more people than spaces provided, enter that information in the notes section below.			
First name	Last name	Relationship to you	Age
How many automobiles does your household own or lease? _____			

Name:	SSN/ITIN:
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EMPLOYMENT INCOME INFORMATION

Provide monthly income information for everyone in the household, including yourself, who is earning wages from an employer and from other sources. For income that is not received monthly, you must provide a monthly average.

Include proof of income with your waiver application when you submit it. Examples of acceptable proof are described starting on page 4.

First and last name	Employer name	Employer city and state	How often are they paid?	How much are they paid?
				\$
				\$
				\$
				\$
				\$

OTHER INCOME INFORMATION

Provide a summary of other income in the household, **including yourself**, that is not from wages. For income that is not received monthly, provide a monthly average.

Source	Gross monthly income	Source	Gross monthly income
Net business income	\$	Net rental income	\$
Investment income	\$	Retirement distributions	\$
Pension income	\$	Social Security income	\$
Child support	\$	Alimony	\$
Public assistance (e.g., SNAP, TANF, Energy Assistance, WIC)	\$		
Other Describe:	\$	Other Describe:	\$

EXTRAORDINARY CIRCUMSTANCES

☐ Please check this box if you believe you have basic living expenses that may exceed the IRS national and local standards. Additional information may be requested as needed.

Please use this section if it is necessary to explain any details of your income documentation that may need clarification and would be helpful for our understanding and review (*i.e. name discrepancies, etc*).

Name:	SSN/ITIN:
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CERTIFICATION AND AUTHORIZATION TO RELEASE INFORMATION

I swear or affirm that the information provided is true and complete. I authorize the release of any financial information to Paid Leave Oregon to verify the accuracy of the above information. I understand providing false information will result in denial of my request for waiver of overpayment recovery.

Printed name: _____

Signature: _____ Date (MM/DD/YYYY): ____ / ____ / ____

Provide all required information and documents. Missing information or documents can cause a delay in processing your request for an overpayment waiver.

Please return this form and the required documentation to:

**Attn: Paid Leave Oregon
Oregon Employment Department
875 Union St NE
Salem, OR 97311**

Need help?

The Oregon Employment Department (OED) is an equal opportunity agency. OED provides free help so you can use our services. Some examples are sign language and spoken-language interpreters, written materials in other languages, large print, audio, and other formats. To get help, please call 833-854-0166 (toll free). TTY users call 711. You can also send an email to paidleave@oregon.gov.

SUPPORTING DOCUMENTATION EXAMPLES

Refer to the information below for documentation we may require you to provide.

Income documentation

Please provide the most up-to-date documents possible. We may not accept documents that are more than 90 days old.

Type of income	Documentation examples
Employment income	<ul style="list-style-type: none"> ● OPTION A <ul style="list-style-type: none"> ◇ One month's worth of the most recent pay stubs <ul style="list-style-type: none"> » If someone is paid less frequently than monthly, the most recent pay stub is sufficient ● OPTION B <i>(if the employee has been working less than one month or does not receive pay stubs)</i> <ul style="list-style-type: none"> ◇ A letter from the employer containing the name of the employer, the employee's start date, the rate of pay, and the number of hours the employee is expected to work each week ● OPTION C <i>(if the employee does not receive pay stubs)</i> <ul style="list-style-type: none"> ◇ Two months' worth of the most recent bank statements showing employment income <ul style="list-style-type: none"> » If employment income is paid in cash, money order, or in any way that does not involve making a deposit, payment receipts are acceptable in lieu of bank statements
Net business income	<ul style="list-style-type: none"> ● OPTION A <ul style="list-style-type: none"> ◇ A full copy of the federal tax return from the most recent filing year <i>(no greater than 18 months since the end of the filing period)</i>, including schedules and attachments ● OPTION B <i>(if no recent tax return is available or the income is too new)</i> <ul style="list-style-type: none"> ◇ PROVIDE ALL OF THE FOLLOWING <ul style="list-style-type: none"> » A signed and dated profit and loss statement of the most recent six months of business activity <ul style="list-style-type: none"> • Don't include any expenses from the Personal Expenses Information section in the profit and loss statement » AND two months' worth of the most recent bank statements showing business activity <ul style="list-style-type: none"> • If business income or expenses are paid in cash, money order, or in any way that does not involve making a deposit, payment receipts are acceptable in lieu of bank statements

SUPPORTING DOCUMENTATION EXAMPLES

<p>Net rental income</p>	<ul style="list-style-type: none"> ● OPTION A <ul style="list-style-type: none"> ◇ A full copy of the federal tax return from the most recent filing year (<i>no greater than 18 months since the end of the filing period</i>), including schedules and attachments ● OPTION B (<i>if no recent tax return is available or the income is too new</i>) <ul style="list-style-type: none"> ◇ PROVIDE ALL OF THE FOLLOWING <ul style="list-style-type: none"> » A signed and dated current (<i>not expired</i>) rental agreement <ul style="list-style-type: none"> • If the tenants are paying month to month, a signed and dated written statement is sufficient as long as it contains the tenant's name, rental property address, the date when the month-to-month arrangement began, the amount the tenant is required to pay, and the tenant's signature » AND a signed and dated rental property expense statement showing expenses (<i>home loan payments, maintenance costs, etc.</i>) for each rental property associated with each provided rental agreement <ul style="list-style-type: none"> • Do not include any expenses from the Personal Expenses Information section in the rental property expense statement » AND two months' worth of the most recent bank statements showing rental income and expenses <ul style="list-style-type: none"> • If rent or expenses are paid in cash, money order, or in any way that does not involve making a deposit, payment receipts are acceptable in lieu of bank statements
<p>Investment income</p>	<ul style="list-style-type: none"> ● OPTION A <ul style="list-style-type: none"> ◇ A full copy of the federal tax return from the most recent filing year (<i>no greater than 18 months since the end of the filing period</i>), including schedules and attachments ● OPTION B (<i>if no recent tax return is available or the income is too new</i>) <ul style="list-style-type: none"> ◇ Two months' worth of the most recent bank statements showing investment income

SUPPORTING DOCUMENTATION EXAMPLES	
Retirement distributions	<ul style="list-style-type: none"> ● OPTION A <ul style="list-style-type: none"> ◇ A full copy of the federal tax return from the most recent filing year (<i>no greater than 18 months since the end of the filing period</i>), including schedules and attachments ● OPTION B (<i>if no recent tax return is available or the income is too new</i>) <ul style="list-style-type: none"> ◇ PROVIDE ALL OF THE FOLLOWING <ul style="list-style-type: none"> » A copy of the most recent account statement for each retirement account showing the current monthly distribution amount and remaining balance » AND two months' worth of the most recent bank statements showing retirement distributions
Public assistance (SNAP, TANF, etc.)	<ul style="list-style-type: none"> ● An official letter, statement, or other document from the benefit provider that describes the benefit amount, frequency, and duration of the public assistance
Pension income	<ul style="list-style-type: none"> ● OPTION A <ul style="list-style-type: none"> ◇ A full copy of the federal tax return from the most recent filing year (<i>no greater than 18 months since the end of the filing period</i>), including schedules and attachments ● OPTION B (<i>if no recent tax return is available or the income is too new</i>) <ul style="list-style-type: none"> ◇ PROVIDE ALL OF THE FOLLOWING <ul style="list-style-type: none"> » A copy of the most recent account statement for each pension account showing the current monthly benefit amount » AND two months' worth of the most recent bank statements showing pension income <ul style="list-style-type: none"> • If pension income is paid in any way that does not involve making a deposit, payment receipts are acceptable in lieu of bank statements
Social Security income	<ul style="list-style-type: none"> ● OPTION A <ul style="list-style-type: none"> ◇ A benefit verification letter or Form 1099 from the most recent tax year ● OPTION B (<i>if option A is not available or the income is too new</i>) <ul style="list-style-type: none"> ◇ PROVIDE ALL OF THE FOLLOWING <ul style="list-style-type: none"> » A copy of the most recent account statement for each source of Social Security income showing the current monthly benefit amount » AND two months' worth of the most recent bank statements showing Social Security income

SUPPORTING DOCUMENTATION EXAMPLES

Child support/ alimony	<ul style="list-style-type: none">● PROVIDE ALL OF THE FOLLOWING<ul style="list-style-type: none">◇ A copy of the current (not expired) signed court or administrative order with the details of the child support or alimony amount, payment frequency, and term duration◇ AND two months' worth of the most recent bank statements showing child support and alimony income<ul style="list-style-type: none">» If child support and alimony is paid in cash, money order, or any way that does not involve making a deposit, payment receipts are acceptable in lieu of bank statements
Other income	<ul style="list-style-type: none">● PROVIDE ALL OF THE FOLLOWING<ul style="list-style-type: none">◇ A signed and dated written statement describing the type of income, frequency, duration, and any other relevant specific details◇ AND two months' worth of the most recent bank statements showing the income<ul style="list-style-type: none">» If other income is paid in cash, money order, or any way that does not involve making a deposit, payment receipts are acceptable in lieu of bank statements● Other forms of documentation may be requested, if necessary