

Use this checklist to prepare an equivalent plan application.

When will my equivalent plan application become effective?

After the Oregon Employment Department (OED) approves your application, your plan will take effect the first day of the calendar quarter immediately following the date of we approved it.

Will I need to send annual renewal applications for my equivalent plan?

- Yes, you must send an equivalent plan application for the first three years after OED approves your plan.
- If you make any changes to your policy, you must send OED a new application.

What do I need to report about my equivalent plan?

You must send an annual benefit usage report. If you withhold contributions from employees, you must also provide an annual financial report.

Get ready

Your paid leave plan must meet Paid Leave Oregon's requirements:

- Cover all Oregon employees (including full-time, part-time, permanent, or temporary) employed with the business for at least 30 days. If you have new employees who were previously covered by another employer's equivalent plan, you will need to cover them on the date of hire.
- Provide 12 weeks paid **family, medical,** and **safe** leave within the eligible employee's benefit year, and an additional two weeks for pregnancy and childbirth-related conditions.
- Make a reasonable effort to issue a decision and the first benefit payment within two weeks of receiving an employee's claim or their first day of leave.
- Don't require employees to contribute more than 60% of the total contribution rate, which must be the same or lower than the annually adjusted state rate.
- Provide a cost breakdown for employee contributions.

- Allow employees to take intermittent and consecutive leave in daily or weekly increments.
- Provide job protection rights to employees if they've been employed for 90 consecutive days.
- Tell your employees about your equivalent plan and provide details about how to file a claim, including posting a workplace notice poster.
- Provide benefit amounts that are equal to or greater than benefit amounts under Paid Leave Oregon and include a detailed calculation of how you calculate their benefit amount.
- Don't put any conditions or restrictions on the use of family, medical, or safe leave beyond those allowed in Paid Leave Oregon rules.
- Provide an appeal process to review benefit decisions when an employee requests it.

Equivalent Plan Application

Here's what you will need to apply:

- Business Identification Number (BIN) and Federal Employer Identification Number (FEIN)
- Employer name, address, and contact information
- A copy of **one** of the following:
 - Employer-administered equivalent plan
 - Insurance policy with the insurance product and chosen options
- For employer-administered plans only, proof of solvency by providing **either**:
 - Proof of sufficient assets
 - A bond or an irrevocable letter of credit with OED named as the payee or beneficiary, issued by an insured institution
- For fully insured plans only, information about the insurance policy and carrier, including:
 - Business and contact information for the insurance carrier
 - The date the policy begins and ends
- \$250 application fee

Find more information about equivalent plans in our [Equivalent Plan Guidebook](#).