

OTHER CONSIDERATIONS

If you are/were a station staff employee or a network newsperson and your AFTRA collective bargaining agreement provided that you were covered under your employer's health and/or pension plan(s) (so your employer was not required to make contributions to AFTRA H&R on your behalf), your earnings will not be considered "covered" earnings and, therefore, will not apply to any benefit accruals. Similarly, if the collective bargaining agreement under which you work or worked caps or limits the amount of AFTRA-covered earnings for which your employer is or was required to make contributions to AFTRA H&R, your earnings above that cap or limit will not be considered covered earnings, and, therefore will not apply to any benefit accruals. If you have questions about the AFTRA collective bargaining agreement, please contact your local AFTRA union office or the union's National News Department at 1-800-638-6796.

DOCUMENTATION MUST COME FROM EMPLOYER

AFTRA H&R cannot conduct a review based on records or documents created by you, your tax preparer, your business manager or your agent. Only documentation generated by a payroll service or your employer can be accepted as proof of earnings.

DOCUMENTATION MUST SHOW ACTUAL EARNINGS

If your documentation clearly shows that you worked in covered employment but does not clearly show the amount of wages paid, AFTRA H&R can only credit the minimum scale wages specified in the collective bargaining agreement or participation agreement.

POSSIBLE HELP FROM LOCAL AFTRA OFFICE

Your local AFTRA union office may be able to help you obtain some documents you do not have, but it is your responsibility to contact that local office to make such a request. Your local AFTRA union office is not able to acquire W-2 forms on your behalf.

Please make sure that any updates to your contact information are made by completing and submitting the Performer Address Change Form to AFTRA H&R. Forms can be obtained from your local union office or by visiting the Forms section of www.aftrahr.com (Forms/General forms).

INSUFFICIENT INFORMATION

Please remember that you know more about your earnings than anyone else, so your documentation must demonstrate (i) that the work in question was performed by you for a contributing employer, (ii) that the work in question was covered work for which the employer was required to make contributions, and (iii) the amount of the covered earnings.

If you have submitted sufficient documentation to proceed with the review of your request, AFTRA H&R will send you an acknowledgement letter confirming that our review is underway. If the documentation submitted is incomplete, you will be sent a letter stating that your inquiry cannot be processed because necessary information is missing and noting the specific information you need to supply. You will need to submit this information within 30 days from the date you receive the letter, but if you require additional time to respond please call AFTRA H&R Contribution Services at (800) 562-4690 or use one of the alternate contact methods previously mentioned in this policy to request more time. If we do not receive the missing documentation or you have not requested more time within the 30-day period, AFTRA H&R will send you a letter stating that we cannot review your request at this time. However, you may re-initiate the review of your initial inquiry by submitting the appropriate documentation at a later date.

Policy for Required Documentation for Covered Earnings Inquiry

POLICY

The purpose of this policy is to outline the necessary documentation Performers are required to supply to the AFTRA Health & Retirement Funds (AFTRA H&R) in order to resolve earnings discrepancy issues when they believe that employers have failed to report or have underreported AFTRA-covered earnings to AFTRA H&R.

EARNINGS STATEMENTS

Each year you receive an Earnings Statement from AFTRA H&R if you have performed AFTRA-covered work in the prior calendar year and therefore have covered earnings in that year.

Covered earnings are those payments made to you by a contributing employer for work under a collective bargaining agreement that requires contributions to AFTRA H&R, or to either Fund.

IMPORTANT NOTE: To maximize your benefits, you should always check the AFTRA signatory status of your employer BEFORE you accept a job to ensure that your employer is, in fact, signed to an AFTRA collective bargaining agreement requiring contributions to be made for your work. Only AFTRA signatory employers can make contributions to the AFTRA Health and Retirement Funds on your behalf.

Review your Earnings Statement carefully as soon as you receive it to confirm that it reflects all of the AFTRA-covered work you performed in the prior year and the related earnings. If you believe that it does not, or if you did not receive an Earnings Statement but think you had covered employment within the corresponding calendar year, please complete and return an Earnings Discrepancy Form as detailed in the following section.

DISCREPANCY FORM

If after reviewing your Earnings Statement you believe that all of your AFTRA-covered employment was not properly credited to AFTRA H&R, fill out an Earnings Discrepancy Form which can be found enclosed with your Earnings Statement or visit the Forms section of www.aftrahr.com (Forms/General forms) and return it to:

AFTRA Health & Retirement Funds
Attn: Contribution Services
261 Madison Avenue, 7th floor, New York, NY 10016

Fax: (212) 499-4973
E-mail: earnings@aftrahr.com

You can also receive a copy of this form free of charge by calling AFTRA H&R Contribution Services at (800) 562-4690 or by requesting a form using one of the contact methods mentioned above.

Along with the Discrepancy Form for each discrepancy **you must submit at least one Record of Payment item and one Record of Work item from the list below.** Pay stubs are preferred to document your Record of Payment. The more Records you can provide, the better AFTRA H&R will be able to validate your earnings and expedite a response to your claim.

RECORD OF PAYMENT:	RECORD OF WORK:
Pay Stubs	Session or Work Report
W-2 Form / 1099 Form	Evidence documenting the type of work performed (e.g. personal services contract or agreement)
Royalty Statement (if you are a royalty artist under the Sound Recording Code)	Proof of participation in AFTRA-covered work
Detailed earnings statement from the Social Security Administration	Name of show / commercial / program
	Name of advertising / production company NOTE: Please be sure to provide the name of the AFTRA signatory employer
	Date(s) work was performed

TO FACILITATE THE PROCESS

To the extent that you are able, it will be beneficial if you provide AFTRA H&R with specific details of the dollar amounts of the earnings that you believe have been reported inaccurately or are missing.

If you have a personal services corporation, a company known as a “Loan Out Company” or an FSO (for services of), provide the name and tax identification number for your corporation or company.