UNDERWRITING SUBMISSION

Class Code Request Form

STAFFING INDUSTRY

Purpose. Complete this form for each new client company or new job location before placing associates. Classification is determined by the client company's business operations — not by the individual duties of the associate — except where a specific exception applies. See the classification rules on page 3.

INSURED NAME

DATE

Assurance, a Marsh & McLennan Agency LLC

TO

FROM

CLIENT COMPANY INFORMATION

FULL LEGAL NAME OF CLIENT COMPANY

CLIENT COMPANY FEIN

CLIENT COMPANY ADDRESS

JOB LOCATION (IF DIFFERENT FROM ABOVE)

CLIENT COMPANY WEBSITE ADDRESS

GOVERNING CLASS CODE

NUMBER OF TEMPORARY ASSOCIATES

ESTIMATED ANNUAL PAYROLL

OPERATIONS & DUTIES

Nature of the client company's business — what does the company do or make?

Detailed description of exactly what the associates will be doing — factory, warehouse, office, hospital, etc.

If the client company is a distributor, does the company have any ownership of the goods distributed?

SITE & OPERATIONS QUESTIONNAIRE

1. What specific operations are occurring at this location?

2. If packing operations are occurring, what is being repackaged?

3. Does the client company have other locations within this state? If so:

		Yes	No
	a. Do the same operations apply at all locations?	☐	☐
	b. Does the client operate in any other function within the state?	☐	☐
4	Are the forklift drivers trained and authorized?	☐	☐
5	Is there any manual lifting over 25 lbs.?	☐	☐
6	Is there above-ground window washing?	☐	☐
7	Is there exposure to hazardous chemicals?	☐	☐
8	What personal protective equipment (PPE) is utilized?		
9	Is there diacetyl (artificial butter flavoring) exposure?	☐	☐
10	Are there cherry-picking operations?	☐	☐
11	Are forklift users certified?	☐	☐
12	Is any lifting over 45 lbs. performed as a two-person team?	☐	☐

ADDITIONAL NOTES

RULES FOR CLASSIFICATION

> *"Subject to certain exceptions, it is the business of the employer within a state that is classified — not the separate employment, occupations, or operations within the business."*

Associates must be classified by what the **client company does or makes**, regardless of the occupation or tasks assigned to the associate by the client company. Except for the exceptions below, you never classify based on the specific job an associate performs within that company.

THE FOUR EXCEPTIONS

1. **Clerical Employees.** If the associates you place work in the office of a company, they are separately classified as clerical employees. Rule IV(b)(2)(a). **Class 8810**
2. **Sales Employees.** If the associates you place are part of the outside sales force of your client, they are separately classified as salespersons. Rule IV(b)(2)(d). **Class 8742**
3. **Drivers.** If the associates you place drive a truck that delivers your client's product, they are classified as drivers. Rule IV(b)(2)(c). **Class 7380**
4. **Specific Class Rules.** The exceptions above do not apply if the classification definition states otherwise. For example: Code 2003 — Bakery & Drivers already includes drivers, so exception 3 would not apply. Code 8820 — Law Office, all employees, clerical, messengers and drivers includes all employees, so none of the exceptions apply.

> **Before submitting.** Confirm the client's legal name and FEIN match the signed service agreement, and that the job location reflects where associates will actually report to work. Incomplete submissions delay code assignment.

FOR CARRIER / BROKER USE ONLY

To be completed by Marsh & McLennan Agency. Do not write below this line.

CODE / RATE _____ ISSUED BY _____ DATE ISSUED _____

The determination of this class code is based on the information provided by you to MMA. All codes are subject to change at audit based on the auditor's findings.