

## H&R Block Caregiver Leave

At H&R Block we understand how important it is to balance life and work and that there are times your family may need additional care. To help support your family during a difficult time, H&R Block offers eligible U.S. regular associates up to 4 weeks of paid time off during a rolling 12-month period to care for a spouse, domestic partner, child or parent who is dealing with a serious health condition.

This is a company-provided benefit and is in addition to, and will be coordinated with, any local or state statutory paid family leave benefits that may be available to an associate.

### **Eligibility:**

The associate must be a regular H&R Block associate and have been employed by H&R Block for at least twelve (12) months and worked at least 1,250 hours during the 12-month period immediately preceding the leave. The request for paid caregiver leave benefits may be used beginning on or after January 1, 2022 and can only be used while the associate is employed at H&R Block. Paid caregiver leave benefits will be approved for time off that would qualify under the FMLA or the H&R Block Leave of Absence policy to care for a covered family member who has a serious health condition. Associates are eligible for this leave even if their FMLA bank has otherwise been exhausted. (For example, an associate who already has used 12 weeks of FMLA for his/her own serious health condition may still qualify for paid Caregiver Leave in the same 12-month period.)

### **Exclusions:**

- A family member of the associate who is not a spouse/domestic partner, child, or parent, as defined below.

### **Definitions:**

**Parent** – biological, adoptive, step or foster father or mother or any other individual who stood *in loco parentis* to the associate when he/she was a minor.

**Child** - biological, adopted, or foster child, a stepchild, a legal ward, or a child of a person standing *in loco parentis*, who is either under age 18 or age 18 or older and incapable of self-care because of a mental or physical disability at the time that FMLA leave is to commence.

**Spouse** - husband or wife as defined or recognized in the State where the individual was married and includes individuals in a same-sex marriage or common law marriage. Spouse also includes a husband or wife in a marriage that was validly entered into outside of the United States if the marriage could have been entered into in at least one State.

**Domestic Partner** - A committed relationship between two adults, of the opposite sex or

same sex, that meets all the requirements set out in, and has been documented by submitting, an Affidavit of Domestic Partnership to H&R Block.

**Policy:**

Effective January 1, 2022, H&R Block will provide up to 4 weeks of paid time off during a rolling 12 month period to care for a covered family member with a serious health condition.

- Applying for Leave. Associates are required to apply for and be approved for FMLA (or for equivalent leave under the H&R Block Leave of Absence Policy) to care for a family member with a serious health condition to be entitled to the paid caregiver leave benefit. Associate may be required to submit documentation of the need to care for the family member, to the extent allowed by law. Associates can contact NY Life for information on FMLA and other local or state leaves at 888-842-4462.
- How this works with other Leaves. Paid caregiver leave must be taken concurrently with other available leave to the extent allowed by law and will not be granted consecutively unless required by law.
- Notice of Intent to Take Leave. Associate should inform their people leader of their leave plans at least thirty (30) days in advance [absent extenuating circumstances].
- Leave Taken as Blocks of Time. Associates may take the paid caregiver leave benefits intermittently, but in no less than four-hour blocks of time.
- How this works with PTO/Vacation/Sick Leave. Paid caregiver leave is separate from paid time off, vacation and/or sick leave, and in general cannot be used concurrently unless concurrent use is specifically allowed by law. Additionally, the Company will not grant paid caregiver leave consecutively with paid time off, vacation and/or sick leave unless required by law.
- Payments. Caregiver leave will be paid through H&R Block payroll on regular payroll dates subject to normal withholdings. Any elected deductions, including the H&R Block Retirement Savings (401(k)) Plan, will continue.
- Termination. Upon termination of employment, associates are not eligible for payment of any unused caregiver leave.
- Coordinating Leave Time. If both parents work for H&R Block, both parents can take paid caregiver leave to care for a child with a serious health condition under this policy, but are expected to coordinate their leave time off in a manner beneficial to the business, to the extent allowed by law.

- How this works with State Paid Family Leave. Paid caregiver leave will be coordinated with paid family leave provided through state paid family leave programs (PFL) to the extent allowed by law. Accordingly, to be eligible for this benefit, associates are expected to apply for available PFL benefits. Paid caregiver leave will function as a top up to 100% base pay for up to four (4) weeks (meaning, the combination of state or local leave and caregiver leave provided by H&R Block, will in no instance be more than 100% of pay). State specific guidance is noted below:
  - Washington: For associates working in Washington, paid caregiver leave will be a supplemental benefit to Washington Paid Family and Medical Leave. An associate may not receive more caregiver leave pay under the H&R Block Parental Leave Policy than will be required to provide the associate with a total of 100% of his/her base pay for the absence.
  - District of Columbia: H&R Block will coordinate paid caregiver leave benefits by estimating what the associate is expected to receive under the District of Columbia PFL and will pay a top up that will bring the associate up to 100% base pay. If the associate receives less PFL than estimated, he/she must promptly inform H&R Block.

### **Process**

Associate responsibilities:

- Discuss the need for caregiver leave with their people leader and People & Culture Business Partner.
- Contact H&R Block's leave administrator, New York Life at 888-842-4462 to initiate the leave process at least thirty (30) days in advance of the needed leave, pending extenuating circumstances.
- Provide any documentation required to New York Life to process the leave.

Manager responsibility:

- Inform the People & Culture Business Partner and Benefits team of the last day worked and the first day back to work.
- Support the associate in their transition to their leave and back to work.