

Summary of OPIF and Greenlight Oregon Labor Rebate Audit Requirements

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In order to process rebates under the Oregon Production Investment Fund (25% of applicable goods/ services paid in Oregon, and 20% of all Oregon-based payroll) and the Greenlight Oregon Labor Rebate (up to an additional 6.2% of Oregon-based payroll) the Oregon Film Office will need the following:

- **Final production cost report for all applicable Oregon-related goods/services, this includes:**
 - **A vendor report** showing payments to all companies registered to do business in Oregon
 - Copies of checks for any vendor expenditures over \$500.
 - **A petty cash report** showing all eligible Oregon petty cash expenditures
 - Copies of all petty cash envelopes with detailed receipts for any single petty cash expenditure above \$500.
 - **NOTE:** These vendor reports should not include any non-Oregon/non-qualifying expenses or any payroll expenditures.
- **Final production summary earning reports (payroll reports) from all applicable payroll companies** showing detailed gross pay, net pay, withholding (specifically Oregon withholding), employee social security numbers and applicable pension, health and vacation contributions. Also required is proof of payment of local taxes (i.e. Tri Met taxes)
 - **NOTE:** The payroll reports must show only Oregon labor, be broken down by quarter, and include full employee social security numbers.
- **A list of all payroll companies** used including name, contact person, email, phone number, Federal Tax ID and Oregon employer ID number.
- **A final crew list** with home addresses and phone numbers.
- **A final vendor list.**
- **A final full set of Production Reports and Callsheets.**
- **Evidence of LLC or production company registration to do business in the State of Oregon**
- **Behind-the-scenes production photos** for use by the Film Office strictly for its governmental relations and marketing purposes.

The Film Office may request additional detail if the audit shows any discrepancies in payments or accounting.

Please note: Payroll rebate cannot be processed until both the final withholding deposit and the final quarterly report is filed for the last quarter applicable to the production.

Also, every incentive participating company is required to have a written diversity, equity and inclusion policy to hire or contract with individuals from underrepresented groups as of the date on which the company submits an application for reimbursement. In accordance with that written policy, each company must actively engage in good faith efforts to hire or contract with individuals from underrepresented groups for the production. This written policy needs to be submitted during the application process and then adhered to during the hiring, prep and production periods. The tracked groups include women, BIPOC, LGTBQ+, Veterans, Recent Immigrant and Living with a Disability amongst others.

In addition each company is required to report diversity statistics for all employee hiring related to the production to Oregon Film ("OFVO") during or after completion of the production. There are two ways to do this -

I) have individuals self-report directly to OFVO upon hiring (here is a link to a questionnaire to do that <https://forms.gle/K6uzGFn8ZghTWu4t9>) and

II) provide a Company wide report to OFVO upon completion of spending in Oregon (here is a link to a form to do that <https://forms.gle/Pz1xXHRZjSZ4Kdm56>).

Individual data will be kept confidential, but it will be used in the aggregate to inform our office of hiring deficiencies and then help explore ways to approach correcting those deficiencies.

These forms have also been given to many of the payroll companies that work with productions in Oregon (e.g. Cast & Crew, EP, Media Services, Greenslate), but it is up to the production to request them to be added to their production's start paperwork, if desired.

We also have a fillable PDF that can be distributed to crew on an individual basis. That can be [found here](#).

Also, each participating company is required to have a written process for addressing claims of harassment, discrimination and other misconduct related to the production (including, but not limited to, procedures for reporting and investigating harassment claims, a phone number for an individual who will be responsible for receiving harassment claims, and a statement that the company will not retaliate against an individual who reports harassment). This needs to be a specific "process" by which complaints and reports can be made and then followed up on in some form. This can be a monitored "hotline" of some type or even a procedure that is handled by a third party (such as [All Voices](#)). The applicant shall also indicate how the policy will be distributed to employees.

We want each production to really think through these requirements and find the policies and procedures that work for them and their project in order to make their sets and studios safe and welcoming places for all people to work. This is why we do not have sample policies that can be just cut and pasted into our form.