

**PROOF OF LOSS CLAIM STATEMENT  
IMPORTANT INFORMATION REGARDING APPLICATION FOR GROUP LONG TERM  
DISABILITY AND GROUP LIFE-WAIVER OF PREMIUM BENEFITS**

**PLEASE READ THESE INSTRUCTIONS BEFORE COMPLETING THE ATTACHED FORMS**

This is a multi-purpose form that requires completion in full by all parties concerned. This information *must be provided two months prior to the end of the elimination period* in order to allow sufficient processing time.

Fax to: 860-272-1137

Or Mail to: Plan Administration, LTD

580 Hazard Avenue

Enfield, CT 06082

**THE EMPLOYER IS RESPONSIBLE FOR COMPLETING THE FOLLOWING SECTIONS:**

Section 1      Employer's Statement, both sides

Section 2      Occupation Analysis, both sides

**THE EMPLOYEE IS RESPONSIBLE FOR COMPLETING THE FOLLOWING SECTIONS:**

Section 3      Employee's Statement, both sides

Section 4      Employment and Education Information, both sides

Section 5      Sign and date the Authorization for Use in Obtaining Information

**THE ATTENDING PHYSICIAN IS RESPONSIBLE FOR COMPLETING THE FOLLOWING:**

Section 6      Physician's Statement

---

**Please be sure that all responsible parties completing and filing a claim for benefits are aware of the following statements which concern claim fraud and abuse:**

Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application is guilty of a crime and may be subject to fines and confinement in prison.

**State of California**

For your protection, California law requires the following to appear on this form: Any person who knowingly presents a false or fraudulent claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in prison.

**State of New Jersey**

Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.

**State of New York**

Any person who knowingly and with intent to defraud any insurance company or other person, files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime and shall also be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.

**State of Oregon**

Any person who, with an intent to knowingly defraud any insurance company or other person, files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, may be subject to prosecution for insurance fraud.

**State of Pennsylvania**

Any person who knowingly and with intent to defraud any insurance company or other person, files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

# RELIANCE STANDARD

Life Insurance Company

a **DELTA** company

**SECTION 1**  
**EMPLOYER'S STATEMENT**  
**DISABILITY CLAIM**  
**GROUP LONG TERM DISABILITY**  
**GROUP LIFE-WAIVER OF PREMIUM**

**TO BE COMPLETED BY EMPLOYER**

THIS CLAIM IS FOR (EMPLOYEE NAME)	SOCIAL SECURITY NUMBER	DATE OF BIRTH
<b>A. INFORMATION ABOUT THE EMPLOYER</b>		
1. COMPANY'S NAME	PROVIDE APPLICABLE POLICY NUMBER(S): Group Policy Number _____	
2. ADDRESS (STREET, CITY, STATE, ZIP)	Long Term Disability _____	Life-Waiver of Premium _____
3. NAME AND ADDRESS OF DIVISION WHERE EMPLOYEE WORKS (IF DIFFERENT FROM ABOVE)		
<b>B. INFORMATION ABOUT THE EMPLOYEE</b>		
1. DATE EMPLOYEE WAS HIRED? (MTH, DAY, YR)	3. DATE EMPLOYEE BECAME INSURED UNDER THIS PLAN?	LTD _____ LIFE _____ MTH DAY YR MTH DAY YR
2. WHAT WAS THE EMPLOYEE'S REGULARLY SCHEDULED WORK WEEK? _____ hrs/wk.	UNDER YOUR PRIOR PLAN?	MTH DAY YR MTH DAY YR
4. PLEASE IDENTIFY THE CLASS OF THIS EMPLOYEE: (Refer to Policy Schedule of Benefits)	LTD _____ LIFE _____	LIFE BENEFIT IN FORCE
5. DATE TO WHICH PREMIUM IS PAID FOR THIS EMPLOYEE	MTH DAY YR MTH DAY YR	\$ _____
6. THE EMPLOYEE IS (CHECK ALL THAT APPLY). PROVIDE COPY OF PAYROLL RECORD AS OF LAST DAY WORKED		
<input type="checkbox"/> HOURLY (RATE: _____ ) <input type="checkbox"/> UNION <input type="checkbox"/> EXEMPT <input type="checkbox"/> FULL-TIME <input type="checkbox"/> COMMISSIONED <input type="checkbox"/> SALARIED <input type="checkbox"/> NON-UNION <input type="checkbox"/> NON-EXEMPT <input type="checkbox"/> PART-TIME <input type="checkbox"/> RECEIVES BONUSES		
7. IF SALARIED, BASIC MONTHLY EARNINGS AS OF LAST DAY WORKED	8. EFFECTIVE DATE OF CURRENT SALARY OR HOURLY RATE _____ / _____ / _____ MTH DAY YR	
9. WILL EMPLOYEE FILE FOR DISABILITY BENEFITS PROVIDED BY ANY EMPLOYER/EMPLOYEE LABOR MANAGEMENT, STATE DISABILITY OR UNION WELFARE PLAN? <input type="checkbox"/> YES <input type="checkbox"/> NO		
A. IF YES, WHAT IS THE WEEKLY AMOUNT? _____ B. WHAT TYPE OF BENEFIT? _____		
C. WHEN DO BENEFITS BEGIN? _____ END? _____		
10. IS CONDITION WORK RELATED? <input type="checkbox"/> YES <input type="checkbox"/> NO	11. HAS CLAIM BEEN FILED WITH WORKERS COMPENSATION? <input type="checkbox"/> YES <input type="checkbox"/> NO <b>IF YES, SEND INITIAL REPORT OF ILLNESS OR INJURY AWARD NOTICE</b>	
12. NAME AND ADDRESS OF YOUR WORKERS COMPENSATION CARRIER: (Include Policy Number)		
Contact Name: _____		Phone Number: _____
13. NAME AND ADDRESS OF YOUR MEDICAL INSURANCE CARRIER OR ADMINISTRATOR IF SELF FUNDED: (Include Policy Number)		
Contact Name: _____		Phone Number: _____
<b>C. INFORMATION NEEDED FOR WITHHOLDING AND REPORTING TAXES</b>		
PERCENTAGE OF PREMIUM PAID BY EMPLOYER: _____ % IS EMPLOYEE TAXED ON THIS AMOUNT? <input type="checkbox"/> YES <input type="checkbox"/> NO		
PERCENTAGE OF PREMIUM PAID BY EMPLOYEE: _____ % <input type="checkbox"/> PRE-TAX DOLLARS <input type="checkbox"/> POST-TAX DOLLARS		
<b>PERCENTAGES MUST TOTAL 100%. IF LEFT BLANK WE WILL ASSUME 100% OF PREMIUM IS PAID BY EMPLOYER AND THAT EMPLOYEE IS NOT TAXED ON THIS AMOUNT. FICA TAXES WILL BE CALCULATED ACCORDINGLY</b>		

**TO BE COMPLETED BY THE EMPLOYER**

**DISABILITY CLAIM EMPLOYER'S STATEMENT**

**D. INFORMATION ABOUT THE CLAIM**

1. WERE THERE ANY CHANGES TO THE EMPLOYEE'S OCCUPATIONAL RESPONSIBILITIES DUE TO THE DISABLING CONDITION BEFORE THE EMPLOYEE BECAME FULLY DISABLED?  YES  NO IF YES, WHAT WERE THE CHANGES AND WHEN WERE THEY MADE? (please attach)
2. WHAT WAS THE EMPLOYEE'S PERMANENT OCCUPATION ON HIS OR HER LAST DAY AT WORK? \_\_\_\_\_
3. HOW LONG HAS THE EMPLOYEE BEEN IN THIS OCCUPATION? \_\_\_\_\_
4. LAST DAY EMPLOYEE ACTUALLY WORKED (MONTH, DAY, YR.) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
5. ON THAT DAY, DID THE EMPLOYEE WORK A FULL DAY?  YES  NO IF NO, HOW MANY HOURS WERE WORKED? \_\_\_\_\_
6. WHY DID EMPLOYEE STOP WORKING?  
 LAYOFF  TERMINATION FOR CAUSE  FAMILY MEDICAL LEAVE ACT  RESIGNATION  RETIRED  DISABILITY

**E. INFORMATION ABOUT YOUR PENSION PLAN (DO NOT COMPLETE FOR MATERNITY CLAIM)**

1. DO YOU HAVE A PENSION PLAN?  YES  NO
2. IF YES, WHAT TYPE?  
 DEFINED BENEFIT  401K  DEFINED CONTRIBUTION  PROFIT SHARING  
 OTHER (EXPLAIN)
3. IS THE EMPLOYEE ELIGIBLE FOR YOUR PENSION PLAN?  YES  NO
4. IF ELIGIBLE, DOES THE EMPLOYEE CONTRIBUTE?  YES  NO
5. IF YES, WHAT PERCENTAGE?
6. IF THE EMPLOYEE IS PARTICIPATING, WHEN IS HE OR SHE ELIGIBLE FOR BENEFITS UNDER THE PLAN? (Month, Day, Year) \_\_\_\_\_
7. IS THE EMPLOYEE RECEIVING ANY OTHER INCOME RELATED TO THIS DISABILITY?  YES  NO  

SOURCE	AMOUNT	PER WEEK/MONTH?
--------	--------	-----------------

**F. INFORMATION ABOUT YOUR REHIRE OR RETURN-TO-WORK POLICIES**

1. DOES YOUR COMPANY HAVE A REHIRE OR RETURN-TO-WORK POLICY FOR DISABLED EMPLOYEES?  YES  NO
2. DO YOU HAVE FULL OR PART-TIME POSITIONS AVAILABLE THAT THIS EMPLOYEE WOULD BE SUITED FOR UNDER A SUPERVISED REHABILITATION PROGRAM?  YES  NO
3. WHAT IS THE NAME, TITLE AND TELEPHONE NUMBER OF THE INDIVIDUAL WE SHOULD CONTACT IF WE IDENTIFY A REHABILITATION OR RETURN-TO-WORK OPTION?

**G. REQUIRED ATTACHMENTS AND SIGNATURE**

**PROOF OF EARNINGS AS DEFINED BY APPLICABLE POLICY (EXAMPLE: PAYROLL RECORDS, W-2, K1, 1099, ETC.).**  
**IF EMPLOYEE WAS COVERED UNDER A PRIOR PLAN, INCLUDE COPY OF PRIOR PLAN.**  
**IF THE EMPLOYEE CONTRIBUTES TO THE PREMIUMS, ATTACH A COPY OF THE ENROLLMENT FORM.**  
**IF YOU HAVE MEDICAL INFORMATION FROM THE EMPLOYEE'S FILE RELATING TO DISABILITY, PLEASE ATTACH COPIES.**  
**IF A WORKERS COMPENSATION CLAIM IS FILED, SEND INITIAL REPORT OF INJURY OR ILLNESS AND AWARD NOTICE.**

NAME/TITLE OF PERSON COMPLETING THIS FORM

Any person who knowingly and with intent to injure, defraud or deceive Reliance Standard Life Insurance Company, files a statement of claim or submits any information in conjunction with a claim containing fraudulent, false, misleading, incomplete or deceptive information commits a fraudulent insurance act, which is a crime. These actions will result in the denial of the claim, and are subject to prosecution under state and/or federal law. Reliance Standard Life Insurance Company will cooperate fully with any prosecution and will seek any and all appropriate legal remedies.

**I CERTIFY THAT THE FACTS AS INDICATED ABOVE ARE TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.**

**X** \_\_\_\_\_  
SIGNATURE

\_\_\_\_\_

TITLE

\_\_\_\_\_

E-MAIL ADDRESS

\_\_\_\_\_

DATE

( ) \_\_\_\_\_

TELEPHONE EXT.

( ) \_\_\_\_\_

FAX

# RELIANCE STANDARD

Life Insurance Company

a **DELTA** company

**SECTION 2**  
**OCCUPATION ANALYSIS**  
**GROUP LONG TERM DISABILITY**  
**GROUP LIFE-WAIVER OF PREMIUM**

**TO BE COMPLETED BY THE EMPLOYER**

THIS CLAIM IS FOR (EMPLOYEE'S NAME)	SOCIAL SECURITY NUMBER	DATE OF DISABILITY (MONTH, DAY, YEAR)
-------------------------------------	------------------------	---------------------------------------

**A. GENERAL INFORMATION ABOUT THE EMPLOYEE'S OCCUPATION**

OCCUPATION TITLE	DOT CODE (DICTIONARY OF OCCUPATIONAL TITLES)	MINIMUM EDUCATION OR TRAINING REQUIRED
------------------	--	--

DOES THE EMPLOYEE PERFORM SUPERVISORY FUNCTIONS?  NO  YES IF YES, HOW MANY PEOPLE ARE SUPERVISED? \_\_\_\_\_

Describe Major Tasks 1. \_\_\_\_\_

Describe Major Tasks 2. \_\_\_\_\_

Describe Major Tasks 3. \_\_\_\_\_

CHECK THE ITEMS BELOW THAT RELATE TO THE EMPLOYEE'S OCCUPATION, USE THESE DEFINITIONS FOR THE FREQUENCY OF OCCURRENCE.

**OCCASIONALLY** MEANS THE PERSON DOES THE ACTIVITY 1% TO 33% OF THE TIME  
**FREQUENTLY** MEANS THE PERSON DOES THE ACTIVITY 34% TO 66% OF THE TIME  
**CONTINUOUSLY** MEANS THE PERSON DOES THE ACTIVITY 67% TO 100% OF THE TIME

	OCCASIONALLY	FREQUENTLY	CONTINUOUSLY
<b>RELATE TO OTHERS</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>WRITTEN AND VERBAL COMMUNICATIONS</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>REASONING, MATH AND LANGUAGE</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>MAKE INDEPENDENT JUDGMENTS</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WHICH OF THE FOLLOWING DESCRIBE THE EMPLOYEE'S WORKING ENVIRONMENT? CHECK ALL THAT APPLY.

<input type="checkbox"/> UNPROTECTED HEIGHTS	<input type="checkbox"/> CHANGES IN TEMPERATURE OR HUMIDITY
<input type="checkbox"/> EXPOSURE TO DUST, FUMES, AND GASES	<input type="checkbox"/> BEING NEAR MOVING MACHINERY
<input type="checkbox"/> DRIVING AUTOMOTIVE EQUIPMENT	<input type="checkbox"/> OTHER HAZARDS

IS THE EMPLOYEE REQUIRED TO TRAVEL?  NO  YES (IF YES, COMPLETE THE FOLLOWING INFORMATION)

HOW DOES THE EMPLOYEE TRAVEL? (AUTOMOBILE, PLANE, ETC.)	WHERE DOES THE EMPLOYEE TRAVEL?	WHAT PERCENT OF THE TIME DOES THE EMPLOYEE TRAVEL?
---	---------------------------------	--

**B. INFORMATION ABOUT THE PHYSICAL ASPECTS OF THE EMPLOYEE'S OCCUPATION**

CHECK THE ITEMS BELOW THAT RELATE TO THE EMPLOYEE'S OCCUPATION AND COMPLETE THE INFORMATION REQUESTED. USE THESE DEFINITIONS FOR THE FREQUENCY OF OCCURRENCE:

**OCCASIONALLY** MEANS THE PERSON DOES THE ACTIVITY 1% TO 33% OF THE TIME  
**FREQUENTLY** MEANS THE PERSON DOES THE ACTIVITY 34% TO 66% OF THE TIME  
**CONTINUOUSLY** MEANS THE PERSON DOES THE ACTIVITY 67% TO 100% OF THE TIME

ACTIVITY	NEVER	OCCASIONALLY	FREQUENTLY	CONTINUOUSLY
STANDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WALKING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SITTING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BALANCING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STOOPING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KNEELING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CROUCHING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CRAWLING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REACHING/WORKING OVERHEAD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIMBING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STAIRS Number of Stairs:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LADDER Height of Ladder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describe Activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PUSHING. _____ LBS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PULLING. _____ LBS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LIFTING/CARRYING. _____ LBS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CAN THE OCCUPATION BE PERFORMED BY ALTERNATING SITTING AND STANDING?  YES  NO

DOES THE OCCUPATION REQUIRE USING FEET TO OPERATE FOOT CONTROLS?  YES  NO IF YES, ON WHAT TYPE OF EQUIPMENT: \_\_\_\_\_

IS GOOD VISUAL ACUITY REQUIRED IN THE OCCUPATION?  YES  NO

WHAT ARE THE MAJOR TASKS REQUIRING USE OF ONE OR BOTH HANDS	ONE HAND	BOTH HANDS
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

# RELIANCE STANDARD

Life Insurance Company

a **DELAWARE** company

## TO BE COMPLETED BY THE EMPLOYER

### C. COMPUTER USAGE INFORMATION

IS USE OF A COMPUTER REQUIRED?  NO  YES (IF YES, CHECK ALL USES THAT APPLY):  WORD PROCESSING  SPREADSHEETS  
 DATA-ENTRY  E-MAIL  OTHER (SPECIFY): \_\_\_\_\_

PERCENTAGE OF TIME SPENT WORKING ON COMPUTER \_\_\_\_\_ %

HAS ANY NECESSARY COMPUTER TRAINING BEEN PROVIDED?  YES  NO

### D. INFORMATION ABOUT THE OCCUPATION AS IT RELATES TO THE DISABILITY

CAN THE OCCUPATION BE MODIFIED TO ACCOMMODATE THE DISABILITY EITHER TEMPORARILY OR PERMANENTLY?  
 YES  NO IF YES, EXPLAIN

IS IT POSSIBLE TO OFFER THE EMPLOYEE ASSISTANCE IN DOING THE OCCUPATION (THROUGH USE OF TECHNOLOGY OR PERSONAL ASSISTANCE FOR EXAMPLE)?  YES  NO

### E. ATTACHMENTS AND SIGNATURE (ATTACH COPY OF THE EMPLOYEE'S OCCUPATION DESCRIPTION

Any person who knowingly and with intent to injure, defraud or deceive Reliance Standard Life Insurance Company, files a statement of claim or submits any information in conjunction with a claim containing fraudulent, false, misleading, incomplete or deceptive information commits a fraudulent insurance act, which is a crime. These actions will result in the denial of the claim, and are subject to prosecution under state and/or federal law. Reliance Standard Life Insurance Company will cooperate fully with any prosecution and will seek any and all appropriate legal remedies.

**I CERTIFY THAT THE FACTS AS INDICATED ABOVE ARE TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.**

**X**

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
TITLE

( ) \_\_\_\_\_  
TELEPHONE EXT.

\_\_\_\_\_  
E-MAIL ADDRESS

( ) \_\_\_\_\_  
FAX

**TO BE COMPLETED BY THE EMPLOYEE**

<b>A. INFORMATION ABOUT YOU</b>			
1. LAST NAME	FIRST	MIDDLE INITIAL	
2. ADDRESS	CITY	STATE/PROVINCE	ZIP
3. TELEPHONE: AREA CODE ( )		4. SOCIAL SECURITY NUMBER	
5. DATE OF BIRTH (MONTH, DAY, YR)	6. HEIGHT	WEIGHT	7. <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
		8. MARITAL STATUS	<input type="checkbox"/> SINGLE <input type="checkbox"/> WIDOWED <input type="checkbox"/> MARRIED <input type="checkbox"/> DIVORCED
9. YOUR EMPLOYER (INCLUDE DIVISION IF APPLICABLE)			
10. OCCUPATION		11. DOMINANT HAND <input type="checkbox"/> RIGHT <input type="checkbox"/> LEFT	
<b>B. INFORMATION ABOUT YOUR FAMILY (REQUIRED TO DETERMINE YOUR ELIGIBILITY FOR SOCIAL SECURITY BENEFITS)</b>			
1. SPOUSE'S NAME (LAST, FIRST)			
2. DATE OF BIRTH (MONTH, DAY, YR)		3. IS YOUR SPOUSE EMPLOYED <input type="checkbox"/> YES <input type="checkbox"/> NO	
4. DO YOU HAVE ANY CHILDREN UNDER AGE 18? <input type="checkbox"/> YES <input type="checkbox"/> NO			
5. DO YOU HAVE HANDICAPPED CHILDREN (REGARDLESS OF AGE)? <input type="checkbox"/> YES <input type="checkbox"/> NO			
6. DO YOU HAVE ANY CHILDREN AGE 18-19, WHO ARE FULL TIME STUDENTS IN ELEMENTARY OR SECONDARY SCHOOLS? <input type="checkbox"/> YES <input type="checkbox"/> NO			
IF YOU ANSWERED YES TO ANY OF THE ABOVE QUESTIONS, PLEASE LIST NAMES. (LAST, FIRST)			DATE OF BIRTH
_____		_____	
_____		_____	
_____		_____	
_____		_____	
<b>C. INFORMATION ABOUT THE CONDITION CAUSING YOUR DISABILITY</b>			
<b>PLEASE ANSWER THE FOLLOWING QUESTIONS:</b>			
1. WHAT WERE YOUR FIRST SYMPTOMS?			
2. WHEN DID YOU NOTICE THEM?		3. DATE YOU WERE FIRST TREATED BY A PHYSICIAN? (MONTH, DAY, YR)	
4. WHY ARE YOU UNABLE TO WORK?			
5. BEFORE YOU STOPPED WORKING, DID YOUR CONDITION REQUIRE YOU TO CHANGE YOUR OCCUPATION OR THE WAY YOU DID YOUR OCCUPATION? <input type="checkbox"/> YES <input type="checkbox"/> NO			
6. HAVE YOU FILED, OR DO YOU INTEND TO FILE A WORKERS COMPENSATION CLAIM? <input type="checkbox"/> YES <input type="checkbox"/> NO			
<b>FOR AN INJURY, ANSWER THE FOLLOWING QUESTIONS:</b>			
7. WHERE AND HOW DID THE INJURY OCCUR?			
8. DATE THE INJURY OCCURRED (MONTH, DAY, YR)		9. DATE YOU WERE FIRST TREATED FOR THIS INJURY BY A PHYSICIAN (MONTH, DAY, YR)	
_____		_____	
<b>D. INFORMATION ABOUT THE DISABILITY</b>			
1. DATE YOU WERE FIRST UNABLE TO WORK ON A FULL TIME BASIS (MONTH, DAY, YR)			
2. LAST DAY YOU WORKED BEFORE THE DISABILITY (MONTH, DAY, YR)			
3. DID YOU WORK A FULL DAY? <input type="checkbox"/> YES <input type="checkbox"/> NO IF NO, EXPLAIN.			
4. HAVE YOU RETURNED TO WORK? <input type="checkbox"/> YES <input type="checkbox"/> NO PART TIME (DATE) _____ FULL TIME (DATE) _____			
5. IF YOU HAVE NOT RETURNED TO WORK, DO YOU EXPECT TO? <input type="checkbox"/> YES <input type="checkbox"/> NO			
PART TIME DATE		FULL TIME DATE	

**DISABILITY CLAIM EMPLOYEE'S STATEMENT**



**TO BE COMPLETED BY THE EMPLOYEE**

<b>EMPLOYMENT AND EDUCATION INFORMATION</b>	
<b>PLEASE PRINT ALL INFORMATION</b>	
1. CLAIMANT'S NAME:	
2. POLICY NUMBER:	
3. SOCIAL SECURITY NUMBER:	
<b>PLEASE COMPLETE THE FOLLOWING INFORMATION AS ACCURATELY AS POSSIBLE. THIS DATA IS NEEDED TO HELP MAKE A THOROUGH EVALUATION OF YOUR CLAIM.</b>	
<b>EDUCATION/TRAINING</b>	
<b>HIGH SCHOOL:</b>	
1. COURSE OF STUDY:	
2. HIGHEST GRADE COMPLETED:	
3. DID YOU OBTAIN YOUR GED IF YOU DID NOT GRADUATE FROM HIGH SCHOOL? <input type="checkbox"/> YES <input type="checkbox"/> NO	
IF YES, WHEN? _____	
IF NO, DO YOU PLAN TO OBTAIN YOUR GED IN THE FUTURE?: <input type="checkbox"/> YES <input type="checkbox"/> NO	
<b>COLLEGE:</b>	
1. DID YOU ATTEND COLLEGE? <input type="checkbox"/> YES <input type="checkbox"/> NO	
2. WHERE?	
3. COURSE OF STUDY:	
4. DEGREE? <input type="checkbox"/> YES <input type="checkbox"/> NO	5. NUMBER OF YEARS COMPLETED:
6. TYPE OF DEGREE:	WHEN?
<b>VOCATIONAL TRAINING:</b>	
1. WHERE?	
2. WHAT TYPE?	
3. CERTIFICATE OR LICENSE OBTAINED?	
4. WHAT SPECIALIZED TRAINING HAVE YOU HAD INCLUDING EQUIPMENT/MACHINERY USED?	
_____	
_____	
_____	
_____	
5. DO YOU HAVE KNOWLEDGE OR PROFICIENCY WITH PERSONAL COMPUTERS? <input type="checkbox"/> YES <input type="checkbox"/> NO	
6. IF YES, PLEASE LIST SOFTWARE PROGRAMS YOU HAVE USED:	
_____	
_____	
_____	
_____	

**TO BE COMPLETED BY THE EMPLOYEE**

<b>EMPLOYMENT HISTORY</b>			
<b>STARTING WITH PRESENT EMPLOYER, PLEASE LIST AND DESCRIBE ALL OCCUPATIONS YOU HAVE HELD IN THE PAST 15 YEARS. IF MORE THAN 1 OCCUPATION WITH ANY EMPLOYER, PLEASE LIST EACH. ATTACH RESUME OR ADDITIONAL PAPER AS NECESSARY.</b>			
1. NAME OF EMPLOYER:			
2. START DATE:	3. END DATE:	4. OCCUPATION TITLE:	5. MONTHLY SALARY:
6. REASON FOR LEAVING:			
7. DETAIL YOUR DUTIES: _____ _____ _____			
8. WHAT WERE THE PHYSICAL/MENTAL REQUIREMENTS?			
9. DID YOU USE A COMPUTER? <input type="checkbox"/> NO <input type="checkbox"/> YES (IF YES, CHECK ALL USES THAT APPLY): <input type="checkbox"/> WORD PROCESSING <input type="checkbox"/> SPREADSHEETS <input type="checkbox"/> DATA-ENTRY <input type="checkbox"/> E-MAIL <input type="checkbox"/> OTHER (SPECIFY):			
10. NAME OF EMPLOYER:			
11. START DATE:	12. END DATE:	13. OCCUPATION TITLE:	14. MONTHLY SALARY:
15. REASON FOR LEAVING:			
16. DETAIL YOUR DUTIES: _____ _____ _____			
17. WHAT WERE THE PHYSICAL/MENTAL REQUIREMENTS?			
18. DID YOU USE A COMPUTER? <input type="checkbox"/> NO <input type="checkbox"/> YES (IF YES, CHECK ALL USES THAT APPLY): <input type="checkbox"/> WORD PROCESSING <input type="checkbox"/> SPREADSHEETS <input type="checkbox"/> DATA-ENTRY <input type="checkbox"/> E-MAIL <input type="checkbox"/> OTHER (SPECIFY):			
19. NAME OF EMPLOYER:			
20. START DATE:	21. END DATE:	22. OCCUPATION TITLE:	23. MONTHLY SALARY:
24. REASON FOR LEAVING:			
25. DETAIL YOUR DUTIES: _____ _____ _____			
26. WHAT WERE THE PHYSICAL/MENTAL REQUIREMENTS?			
27. DID YOU USE A COMPUTER? <input type="checkbox"/> NO <input type="checkbox"/> YES (IF YES, CHECK ALL USES THAT APPLY): <input type="checkbox"/> WORD PROCESSING <input type="checkbox"/> SPREADSHEETS <input type="checkbox"/> DATA-ENTRY <input type="checkbox"/> E-MAIL <input type="checkbox"/> OTHER (SPECIFY):			
28. PROJECTED RETURN TO WORK DATE?		29. HAVE YOU CONTACTED YOUR FORMER EMPLOYER? <input type="checkbox"/> YES <input type="checkbox"/> NO	
30. HAVE YOU BEEN LOOKING FOR EMPLOYMENT? <input type="checkbox"/> YES <input type="checkbox"/> NO			
31. ARE YOU FAMILIAR WITH YOUR LTD POLICY'S RETURN TO WORK INCENTIVES AND REHABILITATION SERVICES? <input type="checkbox"/> YES <input type="checkbox"/> NO			
32. DO YOU USE A COMPUTER AT HOME? <input type="checkbox"/> YES <input type="checkbox"/> NO		33. DO YOU HAVE INTERNET ACCESS? <input type="checkbox"/> YES <input type="checkbox"/> NO	

**AUTHORIZATION FOR USE IN OBTAINING INFORMATION**

NAME OF INSURED: \_\_\_\_\_  
 INSURED'S SSN: \_\_\_\_\_  
 POLICYHOLDER: \_\_\_\_\_

To all physicians and other health care professionals, hospitals, other health care institutions, insurers, medical, hospital and prepaid health plans, pharmacies, employers, group policyholders, contract holders, governmental agencies (including but not limited to the Social Security Administration), private and/or public benefit plan administrators, and/or attorney representatives, including but not limited to covered entities and business associates under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and the accompanying regulations:

You are authorized to provide Reliance Standard Life Insurance Company and/or its authorized administrators with information concerning medical care, advice, and/or treatment provided to me, the above named Insured, and/or any employment, salary and/or benefit-related information concerning me, the above named Insured. I understand that the disclosure of information may include disclosure of protected health information under HIPAA and the accompanying regulations, information regarding treatment for mental illness, the human immunodeficiency virus (HIV) and/or the use of drugs and alcohol. I also understand that information used or disclosed pursuant to this authorization may be subject to redisclosure by the recipient and will no longer be subject to protection under HIPAA and the accompanying regulations. A statement of Reliance Standard Life Insurance Company's privacy policy is available at [www.rsli.com](http://www.rsli.com) or upon request.

I understand that any such information will be used for the purpose of evaluating my claim for benefits. Upon request, I understand that I am entitled to receive a copy of this Authorization. This Authorization is valid from the date signed for the duration of the claim, and may be revoked by me at any time upon written request to the address below. A reproduction of this Authorization shall be considered as valid as the original.

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Insured's Signature

**(If the Insured is unable to sign, an authorized person may sign.)**

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Authorized Person's Signature

Description of Authorized Person's authority to sign on behalf of Insured:

\_\_\_\_\_

# RELIANCE STANDARD

Life Insurance Company

a DELPHI company

SECTION 6  
PHYSICIAN'S STATEMENT  
DISABILITY CLAIM  
GROUP LONG TERM DISABILITY  
GROUP LIFE-WAIVER OF PREMIUM

This form should be completed by the physician who was treating the claimant when he or she last worked.

## TO BE COMPLETED BY THE ATTENDING PHYSICIAN

A. GENERAL INFORMATION				
This claim is for (Patient's Name)			Policy Number	
Date of Birth (Month, Day, Year)	Height (Ft., Inches)	Weight (Lbs.)	Blood Pressure	Patient's Social Security Number
Primary Diagnosis including ICD9 code				
B. PREGNANCY: PHYSICIAN COMPLETES THIS SECTION FOR NORMAL PREGNANCY				
1. DATE OF LAST MENSTRUAL PERIOD	2. EXPECTED DATE OF DELIVERY	3. TYPE OF DELIVERY EXPECTED	4. DATE OF DELIVERY	
5. INITIAL VISIT FOR THIS PREGNANCY	6. LAST DATE OF TREATMENT	7. EXPECTED LENGTH OF POSTPARTUM RECOVERY		
C. PHYSICIAN COMPLETES THIS SECTION FOR ALL CONDITIONS EXCEPT NORMAL PREGNANCY				
1. PRIMARY DIAGNOSIS (INCLUDING ICD-9 CODE):				
2. SYMPTOMS (subjective)				
3. OBJECTIVE FINDINGS: (PLEASE PROVIDE COPIES OF TEST RESULTS AND OFFICE NOTES)				
4. ARE THERE ANY SECONDARY CONDITIONS CONTRIBUTING TO DISABILITY? IF YES, WHAT ARE THEY? (INCLUDING ICD-9 OR DSMIII R CODE):				
5. WHEN DID SYMPTOMS FIRST APPEAR	6. DATE OF PATIENT'S FIRST VISIT	7. DATE OF PATIENT'S LAST VISIT	8. FREQUENCY OF VISITS	
____/____/____ MTH DAY YR	____/____/____ MTH DAY YR	____/____/____ MTH DAY YR		
9. WAS THE PATIENT REFERRED BY ANOTHER MEDICAL PRACTITIONER?		10. IF SO, FURNISH THE NAME AND ADDRESS.		
11. IS THE PATIENT'S CONDITION WORK RELATED? <input type="checkbox"/> YES <input type="checkbox"/> NO IF YES, EXPLAIN:				
12. HAS THE PATIENT UNDERGONE A SURGICAL PROCEDURE? <input type="checkbox"/> YES <input type="checkbox"/> NO IF NO, SKIP TO 13.				
12a. PROCEDURE:		12b. DATE:	12c. FACILITY (NAME/ADDRESS)	
13. DO YOU EXPECT SURGERY IN THE NEAR FUTURE? <input type="checkbox"/> YES <input type="checkbox"/> NO IF NO, SKIP TO 14.				
13a. PROCEDURE:		13b. DATE:	13c. FACILITY (NAME/ADDRESS)	
14. WHAT PRESCRIBED MEDICATION IS THE PATIENT CURRENTLY TAKING AND WHAT DOSAGE?				
15. HAVE YOU REFERRED THE PATIENT FOR OTHER TYPES OF CONSULTATIONS? <input type="checkbox"/> YES <input type="checkbox"/> NO IF YES, EXPLAIN.				
16. HAVE YOU REFERRED THE PATIENT TO A MEDICAL REHABILITATION OR THERAPY PROGRAM? IF YES, PLEASE IDENTIFY:				
D. PHYSICIAN COMPLETES FOR ANY HOSPITAL CONFINEMENTS				
1. NAME AND ADDRESS OF HOSPITAL:		2. DATE(S) CONFINED FROM/TO IN THE PRIOR 2 YEARS.		

**TO BE COMPLETED BY THE ATTENDING PHYSICIAN**

<b>E. DESCRIPTION OF PATIENT'S RESTRICTIONS AND LIMITATIONS</b>					
1. Over the course of an 8 hour day, with 2 breaks and lunch, the patient can alternately:	stand	<input type="checkbox"/> None	<input type="checkbox"/> 1-3 Hours	<input type="checkbox"/> 3-5 Hours	<input type="checkbox"/> 5-8 Hours
	sit:	<input type="checkbox"/> None	<input type="checkbox"/> 1-3 Hours	<input type="checkbox"/> 3-5 Hours	<input type="checkbox"/> 5-8 Hours
	walk:	<input type="checkbox"/> None	<input type="checkbox"/> 1-3 Hours	<input type="checkbox"/> 3-5 Hours	<input type="checkbox"/> 5-8 Hours
	drive:	<input type="checkbox"/> None	<input type="checkbox"/> 1-3 Hours	<input type="checkbox"/> 3-5 Hours	<input type="checkbox"/> 5-8 Hours
2. Patient can use upper extremities for repetitive:	A. Simple Grasping	Right <input type="checkbox"/> Yes <input type="checkbox"/> No	B. Pushing/Pulling	Right <input type="checkbox"/> Yes <input type="checkbox"/> No	C. Fine Manipulation
	Left <input type="checkbox"/> Yes <input type="checkbox"/> No	Left <input type="checkbox"/> Yes <input type="checkbox"/> No	Left <input type="checkbox"/> Yes <input type="checkbox"/> No	Left <input type="checkbox"/> Yes <input type="checkbox"/> No	Left <input type="checkbox"/> Yes <input type="checkbox"/> No
3. Patient is able to:	CONTINUOUS 67-100%	FREQUENT 34-66%	OCCASIONAL 0-33%	NO RESTRICTIONS	
Bend (at waist)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Squat (at waist)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Climb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reach above Shoulder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Kneel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Crawl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Use Feet (foot controls)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. In an 8 hour day patient can lift/carry:					
<input type="checkbox"/> 10 lbs. maximum and occasionally carry small objects:	SEDDENTARY WORK				
<input type="checkbox"/> 20 lbs. maximum and frequently lift/carry up to 10 lbs.:	LIGHT WORK				
<input type="checkbox"/> 50 lbs. maximum and frequently lift/carry up to 25 lbs.:	MEDIUM WORK				
<input type="checkbox"/> 100 lbs. maximum and frequently lift/carry up to 50 lbs.:	HEAVY WORK				
<input type="checkbox"/> In excess of 100 lbs. and frequently lift/carry 50 lbs.:	VERY HEAVY WORK				
<b>F. PHYSICIAN COMPLETES IF LIMITATIONS ARE MENTAL/NERVOUS IN NATURE</b>					
TO WHAT DEGREE, IF ANY, ARE THE FOLLOWING CAPACITIES AFFECTED?					
<b>CAPACITY</b>	NOT LIMITED	MODERATELY LIMITED	EXTREMELY LIMITED		
Ability to relate to other people beyond giving and receiving instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ability to complete and follow instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ability to perform simple and repetitive tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ability to perform complex and varied tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
In your opinion, does the claimant possess the mental capacity to understand his/her financial affairs and to direct the use of his/her funds? <input type="checkbox"/> Yes <input type="checkbox"/> No					
<b>G. PHYSICIAN COMPLETES ONLY IF THE CONDITION IS CARDIAC IN NATURE</b>					
Functional Capacity	<input type="checkbox"/> Class 1 (no limitation)	<input type="checkbox"/> Class 2 (slight limitation)			
(American Heart Association)	<input type="checkbox"/> Class 3 (marked limitation)	<input type="checkbox"/> Class 4 (complete limitation)			
<b>H. PHYSICIAN COMPLETES FOR ALL CONDITIONS: PROGNOSIS FOR RECOVERY</b>					
1. HAS THE PATIENT ACHIEVED MAXIMUM MEDICAL IMPROVEMENT? <input type="checkbox"/> Yes <input type="checkbox"/> No					
2. IF YES, AS OF WHAT DATE CAN PATIENT RETURN TO WORK? _____ / _____ / _____					
MTH      DAY      YR					
3. IF NO, WHEN DO YOU EXPECT PATIENT WILL ACHIEVE MAXIMUM MEDICAL IMPROVEMENT?					
<input type="checkbox"/> <2 weeks	<input type="checkbox"/> <4 weeks	<input type="checkbox"/> <2 months	<input type="checkbox"/> 3-4 months		
<input type="checkbox"/> 5-6 months	<input type="checkbox"/> 6-8 months	<input type="checkbox"/> <12 months	<input type="checkbox"/> <16 months		
4. WHEN THE ABOVE CHANGE OCCURS, WHAT FUNCTIONAL CAPACITY WILL THE PATIENT RECEIVE?					
<input type="checkbox"/> FULL RECOVERY	<input type="checkbox"/> IMPROVED OVER CURRENT BUT NOT FULL	<input type="checkbox"/> REMAIN AT PRESENT			
Any person who knowingly and with intent to injure, defraud or deceive Reliance Standard Life Insurance Company, files a statement of claim or submits any information in conjunction with a claim containing fraudulent, false, misleading, incomplete or deceptive information commits a fraudulent insurance act, which is a crime. These actions will result in the denial of the claim, and are subject to prosecution under state and/or federal law. Reliance Standard Life Insurance Company will cooperate fully with any prosecution and will seek any and all appropriate legal remedies.					
Your Name (Please Print)			Degree		
Specialty		Telephone: (    )			
		Fax: (    )			
Address (Please Print)					
Physician's Signature (no stamp)				Date	

**IMPORTANT: PLEASE ATTACH ALL MEDICAL RECORDS FROM THREE (3) MONTHS PRIOR TO DATE OF DISABILITY TO PRESENT.**