Long Term Disability Notice of Claim Package



EMPLOYER NOTICE OF CLAIM - INSTRUCTIONS

At approximately 45 days before end of benefit waiting period:

A. Complete the Employer's Report of Claim in full.

Include:

- Job description (detailed duties, including physical requirements)
- Documentation of earnings in accordance with your plan description
- Workers' Compensation information (copy of first report of accident and the decision if any has been determined at this time)
- B. Give remaining part form to claimant for completion. These forms should be forwarded to the address shown below.

Request:

- Copy of awards from other source of benefits: Social Security, Workers' Compensation, Retirement, State Disability, No-fault auto insurance and any other disability income
- That the employee forward proof of his/her age
- C. If claimant has more than one treating physician, give claimant additional forms for completion.
- D. All portions of this form package must be completed to avoid undue delay in processing claimant's request for benefits.
- E. Any questions about these claim filing procedures should be referred to:

Anthem Life Insurance Company Disability Claims Service Center P.O. Box 105426 Atlanta, GA 30348-5426

Phone: 800-813-5682 Fax: 800-850-0017 E-mail: lifeanddisabilityclaims@anthem.com

Long Term Disability Claim Form Employer Statement





EMPLOYER STATEMENT									
1a Employee last name	1b Employee first name		MI	² Social :	Security no.			3 Birthdate	(mm/dd/yyyy)
4a Street address	4b City				^{4c} State	4d ZIP c	ode	5 Phone no	
⁶ Policy no.	⁷ Certificate no.		1	8 Billing	unit			9 Class	
10 Employee date of hire (mm/dd/yyyy)	11 Effective date of LTD cove	rage (mm/dd/yyyy)			12 Date	employe	e last worked	full-time (mm,	/dd/yyyy)
EMPLOYMENT									
13 Occupation at time last worked (Attach job description.)	14 Work schedule No. of days pe				No. of	hours per day	<i>j</i> :	
15 <u>Re</u> ason for leaving <u>wor</u> k:		16 Has employee	return	ned to wo	ork?	Yes 🗆	No .		
☐ Sickness ☐ Granted LOA ☐ Laid off ☐ Dismissed ☐ Resigned ☐ Vacation	☐ Retired ☐ Other	☐ Part-time -						- Date:	
INCOME									
17 How is employee paid? Straight salary Hourly Salary and Hourly Salary and		18 Employee's ba \$ LTD benefit							
Employee pays: % Employer pays: %	0/4	If salary is bas				the No	of months:		
OTHER BENEFITS		in odiary to bac	, ou on	1000 thu	12				
20 Has insured received other disability payments since ti Salary Continuance: Yes No If yes, weekly amount: Date benefits cease (mm/dd/yy):	Insured Short Term: Yes If yes, weekly amount:				If yes, v	veekly ar	mount:	yy):	☐Yes ☐No
21 Did claim result from job activity? Yes No If yes, explain:	22 Has Workers' Compensation Yes No Pending Denie	on claim been filed? ed (enclose copy)			\$			n weekly amou	
RETIREMENT									
²⁴ Is employee covered by sponsored retirement plan?	Yes □ No	25 Does retireme	nt plar	n contair	n a disabi	ity provi	sion? \(\square\) Yes	s 🗆 No	
²⁶ Is employee or will this employee be eligible for a disab	ility or retirement pension? 🗌 Yes 🗀] No							
If yes, type: Disability Retirement	Other:								
Monthly amount: \$	_ Date benefits commence (mm/dd	l/yy):		-					
Note: If any portion of this pension benefit is attributable	to the employee's contribution, please p	provide details includ	ing th	e percen	tage of h	is/her co	ntribution to	the total cont	ribution.
CERTIFICATION									
27 Employer name		28 Employer phor	ne no.				29 Certifica	te no.	
30a Employer street address		30b City						State	ZIP code
31 Employer (taxpayer) ID no. (EIN)		OR 32 Public em	ployer	Social S	Security r	0.		, 	•
33 Printed name of authorized company representative		34 Title							
35 Signature of authorized company representative		36 Date (mm/dd/	уууу)						
Λ									

Separate and send this form (with other enclosures) to the address shown on the front page. Give the remaining forms to the claimant.

Save and Print Form

The laws of some states require us to provide you with the following information:

Alaska: A person who knowingly and with intent to injure, defraud, or deceive an insurance company files a claim containing false, incomplete, or misleading information may be prosecuted under state law.

Arizona: For your protection Arizona law requires the following statement to appear on this form. Any person who knowingly presents a false or fraudulent claim for payment of a loss is subject to criminal and civil penalties.

Arkansas, Louisiana, and West Virginia: 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 for insurance is guilty of a crime and may be subject to fines and confinement in prison.

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

Colorado: It is unlawful to knowingly provide false, incomplete, or misleading facts or information to an insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance, and civil damages. Any insurance company or agent of an insurance company who knowingly provides false, incomplete, or misleading facts or information to a policyholder or claimant for the purpose of defrauding or attempting to defraud the policyholder or claimant with regard to a settlement or award payable from insurance proceeds shall be reported to the Colorado division of insurance within the department of regulatory agencies.

Delaware and Idaho: Any person who knowingly, and with intent to injure, defraud or deceive any insurer, files a statement of claim containing any false, incomplete or misleading information is guilty of a felony.

District of Columbia: WARNING: It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits, if false information materially related to a claim was provided by the applicant.

Florida: Any person who knowingly, and with intent to injure, defraud or deceive any insurer, files a statement of claim containing any false, incomplete or misleading information is guilty of a felony of the third degree.

Indiana: A person who knowingly and with intent to defraud an insurer files a statement of claim containing false, incomplete, or misleading information commits a felony.

Kentucky: Any person who knowingly and with intent to defraud any insurance company or other person files a 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.

Maine, Tennessee, Virginia, and Washington: It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties may include imprisonment, fines or denial of insurance benefits.

Minnesota: A person who files a claim with intent to defraud or helps to commit a fraud against an insurer is guilty of a crime.

New Hampshire: Any person who, with a purpose to injure, defraud, or deceive any insurance company, files a statement of claim containing any false, incomplete or misleading information is subject to prosecution and punishment for insurance fraud, as provided in N.H. Rev. Stat. Ann. §638:20.

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

New Mexico: A person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to civil fines and criminal penalties.

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 materials 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 violation.

Ohio: Any person who, with intent to defraud or knowing that he is facilitating a fraud against an insurer, submits and application or files a claim containing a false or deceptive statement is guilty of insurance fraud.

Oklahoma: WARNING: Any person who knowingly, and with intent to injure, defraud, or deceive any insurer, makes any claim for the proceeds of an insurance policy containing any false, incomplete or misleading information is guilty of a felony.

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.

Texas: 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 state prison.

Long Term Disability Claim Form Employee Statement



EMDLOVEE CT	ATEMENT														
1a Last name	ATEMENT			1b First name				МІ	² Social S	Sacuri	ity no			3 Phone no.	
Ta Fast Hallie				To LILOT HAIRE				IVII	2 SUCIAI (ity iiu.	l		Filolic IIO.	
4a Street address					4b City					j			4c State	4d ZIP code	
Tu Street duuress	1				TO GILY								To State	ZIF Code	
⁵ Birthdate (mm/d	Hd/mmm)	⁶ Height	7 Weight	8 Sex	9 Marital status		10 Spous	o hir	thdata (n	nm/dd	/www)			11 Is spouse employed?	
o bii tiiuate (iiiii)	шиуууу	o Height	, weight	Male	Single	Married	10 Spous	ic nii	tiluate (ii	iiii/uu	ı yyyy <i>ı</i>			Yes No	
				Female	Widowed	Divorced	First n	name	:						
12 No. of children under age 19	13 List unm Name	narried children		t yet finished high : date (mm/dd/yyyy			Birthdato	e (mi	m/dd/yyy	y) I	Name			Birthdate (mm/dd/yyyy)	
14 Employer name	<u> </u>			15 Group policy n		16 Level of e (pleat Grade 1 2 3	ducation se check p e school/Hi 4 5 6 7	rope igh s	<i>r box)</i> chool: 9 10 11 1	.2		_	:		
												Gradua	aduate:		
EMPLOYMENT															
17 Occupation (Lis						1001-1						01.1			
18 Date of accide symptoms of il	nt or date first n Iness (mm/dd/y)			en unable to work v since (mm/dd/yyy		20 I returned (mm/dd/y		ın a ç	iart-time	Dasis	on		urnea to v 1/dd/yyyy)	vork on a full-time basis on	
22 Is your accider	nt or illness relat	ed to your occi	ipation?	Yes No		1	-								
23 If yes, explain:		•													
Have you, or do	you intend to f	ile a Workers' C	ompensation	claim? ☐ Yes ☐	No										
CLAIMS HISTO	RY														
24 Describe how a	and where accide	ent occurred or	describe the	onset and nature o	of your illness:										
☐ Auto ☐ Home	Work Other														
		. 0.2 - 20													
25 Date you were		this illness or i	njury (mm/dd 	/yyyy):											
	Hospital name														
	01					0.1						la.	.1.	710 !	
	Street address					City						31	ate	ZIP code	
26	Dantes seems														
Treated by	Doctor name														
	Ctuost = 4 1					Oitu						١,,	·oto	7ID and a	
	Street address					City						St	ate	ZIP code	
27 Have you ever		similar condition	on in the past	? Lyes No	If yes, comple	te no. 28.									
	Hospital name														
	Street address					City						St	ate	ZIP code	
00															
Treated by	Doctor name					<u> </u>									
						lau.						1		Tere .	
	Street address					City						St	ate	ZIP code	

Long Term Disability Claim Form Employee Statement (continued)



INCOME 29 Describe other income you are receiving:			
Yes No	Amount	Date Began (mm/dd/yyyy)	Date Terminated (mm/dd/yyyy)
Social Security (disability or retirement)	\$		
State disability	\$		
Retirement (normal, early or disability)	\$		
Workers' Compensation	\$		
Group disability benefits	\$		
Other (describe):	<u> </u>	<u> </u>	
BENEFITS			
30 Have you, or do you plan to apply for any benefits described above?]Yes □No		
Type		Filed (mm/dd/yyyy)	
		=	
		=	
31 If your request for benefits is approved do you want us to withhold amo	unts from each benefit check for federal inco	me tax purposes? 🗌 Yes 🔲 No	
If yes, what amount? \$ (Indicate amount pe	er month, \$88.00 minimum.)		
32 If your request for benefits is approved do you want us to withhold amo	ount from each benefit check for state tax pu	rposes?	
If yes, what amount? \$ (Indicate amount pe		•	
Any person who knowingly and with intent to defraud or	deceive any insurance company fil	es a statement of claim containing	any false or misleading
information may be subject to criminal penalties.		_	
The above statements are true and complete to the best	of my knowledge and belief.		
Employee signature			Date (mm/dd/yyyy)
V			

Long Term Disability Employee Authorization for Release of Information



AUTHORIZATION TO BE COMPLETED BY CLAIMANT

AUTHORIZATION FOR RELEASE OF INFORMATION (HIPAA COMPLIANT)

(to be signed and dated by the insured/claimant)

I authorize any licensed physician, any other medical practitioner or provider, pharmacist, hospital, clinic, other medical or medically related facility, federal, state or local government agency, insurance or reinsuring company, consumer reporting agency or employer having information available as to diagnosis, treatment and prognosis with respect to any physical or mental condition and/or treatment of me, and any non-medical information about me, to give any and all such information to authorized representatives of Anthem Life Insurance Company (Anthem Life) and including, but not limited to any other mental or psychiatric records, medical, dental and hospital records (including psychiatric, alcohol, and drug abuse, and HIV/AIDS information) which may have been acquired in the course of examination or treatment. I understand that the information obtained by use of this authorization will be used by Anthem Life representatives to evaluate and adjudicate my current disability claim, and may be re-disclosed to (a) any medical, investigative, financial or vocational specialist or entity, or (b) any other organization or person, employed by or representing Anthem Life solely to assist with the evaluation and adjudication of my current disability claim. Each such person or entity to whom this re-disclosure is made shall comply with the HIPAA Privacy Rule as regards any re-disclosed protected health information.

This authorization is valid during the pendency of my claim and shall expire on the date my claim finally ends. A photocopy of this authorization is as valid as the original. I understand that my authorized representative or I have the right to request and receive a copy of this authorization and the information to which it pertains.

I understand that I have the right to revoke this authorization by notifying Anthem Life in writing, of my revocation. However, such revocation is not effective to the extent that Anthem Life have relied previously upon this authorization for the use or disclosure of my protected health information. In addition, I understand that my revocation of, or my failure to sign this authorization may impair Anthem Life's ability to evaluate my current disability claim and as a result may be a basis for denying that current disability claim for benefits.

If you reside in California, Connecticut or North Dakota: This authorization excludes the release of information about Human Immunodeficiency Virus (HIV).

If you reside in Minnesota: This authorization excludes the release of information about HIV (AIDS VIRUS) tests.

If you reside in Maine: This authorization excludes disclosure of the result of a test for HIV if the applicant has tested positive but has not developed symptoms of the disease AIDS. Such test results shall not be discovered or published. Nothing in this caveat will prohibit this authorization from including the fact that the applicant has AIDS.

If you reside in Vermont: This authorization EXCLUDES the release of any information about previously administered HIV-related tests, including but not limited to tests for HIV antibodies, T-Cell counts, AIDS or ARC. The proposed insured is NOT AUTHORIZING ANTHEM LIFE to forward the results from any new test, requested by us, to any outside, non-affiliated company or entity not under specific contract with us to perform underwriting services, and ANTHEM LIFE shall comply, as applicable with the provisions of Title 8, Section 4724 (20) of the Vermont Statutes.

Claimant printed name		Birthdate (mm/dd/yyyy)
Claimant signature		Date (mm/dd/yyyy)
X		
	Description of personal representative's authority, if applicable (If signed by authorized representative, attach verification of it	

Send completed form to:

Anthem Life Insurance Company Disability Claim Service Center - LTD Unit P.O. Box 105426 Atlanta, GA 30348-5426

For customer service:

Call: 800-813-5682 Fax: 800-850-0017

Long Term Disability Claim Form Attending Physician's Statement



HISTORY		
Patient last name	First name	M.I. Birthdate (mm/dd/yyyy)
1 duont last name	That hallo	M.i. Dirtituate (IIIII/aa/yyyy)
Date symptoms first appeared or	Has patient ever had same or similar condition?	No. 16.000 state when and decoding.
accident happened (mm/dd/yyyy) because of disability (mm/dd	Has patient ever nad same or similar condition? Yes	NO IT yes, state when and describe:
Is condition due to injury or sickness arising out of patient's emp	loyment? Names and addresses of other treating physicians	
Yes No Unknown		
DIACNOSIS (If disabling condition is due to a mental or pervo	us disorder, the attached Functional Capabilities Evaluation and Menta	al Status Quastionnaira sactions must also ha completed \
Diagnosis (including complications)	Subjective symptoms	If pregnancy, estimated date of delivery
Diagnosis (including complications)	Subjective Symptoms	ii pregnancy, estimated date or delivery
Objective findings (including current X-rays, EKGs, laboratory data	a and any clinical findings	
TREATMENT		
	Date of last visit (mm/dd/vany)	Fraguanay
Date of first visit (mm/dd/yyyy)	Date of last visit (mm/dd/yyyy)	Frequency
		☐ Weekly ☐ Monthly ☐ Other:
Nature of treatment (Including surgery and medications prescrib	ed, if any.)	
g., g., y.		
PROGRESS		
Patient's present condition	Is patient?	Is patient mentally competent to endorse checks and direct
		proceeds thereof?
	II TAMONIATORY I THOUSE COMMON	
☐ Recovered ☐ Improved ☐ Regressed	Ambulatory House confined Bed confined Hospital confined	☐ Yes ☐ No
☐ Unchanged ☐ Regressed	Bed confined Hospital confined	
Unchanged Regressed Has patient been hospital confined? Yes No If yes, ple	Bed confined Hospital confined ase complete the following:	(mm/dd/yyyy (mm/dd/yyyy
Unchanged Regressed Has patient been hospital confined? Yes No If yes, ple Hospital name:	Bed confined Hospital confined ase complete the following:	
☐ Unchanged ☐ Regressed Has patient been hospital confined? ☐ Yes ☐ No If yes, ple Hospital name: Hospital address:	Bed confined Hospital confined ase complete the following:	(mm/dd/yyyy (mm/dd/yyyy
Unchanged Regressed Has patient been hospital confined? Yes No If yes, ple Hospital name: Hospital address: CARDIAC	Bed confined Hospital confined ase complete the following:	(mm/dd/yyyy (mm/dd/yyyy from: through:
Unchanged Regressed Has patient been hospital confined? Yes No If yes, ple Hospital name: Hospital address: CARDIAC Functional capacity (American Heart Association)	Bed confined Hospital confined ase complete the following: Confined	(mm/dd/yyyy (mm/dd/yyyy
Unchanged Regressed Has patient been hospital confined? Yes No If yes, ple Hospital name: Hospital address: CARDIAC Functional capacity (American Heart Association)	Bed confined Hospital confined ase complete the following:	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year
Unchanged	Bed confined Hospital confined ase complete the following: Confined	(mm/dd/yyyy (mm/dd/yyyy from: through:
Unchanged Regressed Has patient been hospital confined? Yes No If yes, ple Hospital name: Hospital address: CARDIAC Functional capacity (American Heart Association) Class 1 (no limitations) Class 2 (slight limitations)	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year
Unchanged ☐ Regressed Has patient been hospital confined? ☐ Yes ☐ No ☐ If yes, ple Hospital name: Hospital address: CARDIAC Functional capacity (American Heart Association) ☐ Class 1 (no limitations) ☐ Class 2 (slight limitations) ☐	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations)	(mm/dd/yyyy (mm/dd/yyyy from: through:
Unchanged Regressed Has patient been hospital confined? Yes No If yes, ple Hospital name: Hospital address: CARDIAC Functional capacity (American Heart Association) Class 1 (no limitations) Class 2 (slight limitations) IMPAIRMENTS Physical impairments (*As defined in Federal Dictionary of Occup. Class 1 - No limitations of functional capacity; capable of heact Class 2 - Medium manual activity* (15-30%)	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year/
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%)	(mm/dd/yyyy (mm/dd/yyyy from: through:
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through:
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through:
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year
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Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through:
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Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year
Unchanged	Bed confined Hospital confined ase complete the following: Confined Class 3 (marked limitations) Class 4 (complete limitations) ational Titles.) vy work* no restrictions (0-10%) ght work* (35-55%) of clerical/administrative (sedentary*) activity (60-70%)	(mm/dd/yyyy (mm/dd/yyyy from: through: Blood pressure last year

Long Term Disability Claim Form Attending Physician's Statement (continued)



IMPAIRMENTS (continued)									
Mental Impairments (if any):									
(a) Please define "stress" as it applies to this claimant and in light of his/her job requiremen	nts.								
(b) What stress and problems in interpersonal relations has claimant had on job?									
☐ Class 1 - Patient is able to function under stress and engage in interpersonal relations (no limitations) ☐ Class 2 - Patient is able to function in most stress situations and engage in most interpersonal relations (slight limitations) ☐ Class 3 - Patient is able to engage in only limited stress situations and engage in only limited interpersonal relations (moderate limitations) ☐ Class 4 - Patient is unable to engage in stress situations or engage in interpersonal relations (marked limitations) ☐ Class 5 - Patient has significant loss of psychological, physiological personal and social adjustment (severe limitations)									
PROGNOSIS									
Is patient now totally disabled? (unable to be gainfully employed)	Date patient became disabled due to present illness (mr	m/dd/yy	ууу)						
Patient's Job: ☐ Yes ☐ No Any other work: ☐ Yes ☐ No									
When do you expect a fundamental or marked change in the future?	_								
·	ient's job Other work								
REHAB									
Is patient a suitable candidate for occupational rehabilitation? Patient's own job? Yes No Any other work? Yes No	Can present job be modified to allow for handling with in \square Yes \square No	mpairme	ent?						
When could trial employment commence?									
Patient's Own Job Any Other	Work								
Date (mm/dd/yyyy):	/dd/yyyy): Full-time Part-time								
REMARKS									
Limitations, therapy, etc.									
Printed attending physician name Degr	rop		Phone no.						
Degr			THORE III.						
Street address City	Is	State	ZIP code						
Signature	I		Date (mm/dd/yyyy)						
X									

Long Term Disability Claim Form Supplemental Attending Physician's Statement



MENTAL STATUS QUESTIONNAIRE (Needs to be complete	ad only if condition is due	a to montal or norvous disorder \		
Patient last name	ed only it condition is due	First name		M.I.
Date treatment began (mm/dd/yyyy)	Continuing?	<u></u>	Date treatment terminated (mm/dd/yyyy)	
	☐ Yes ☐ No			
Diagnosis (Use DSM III Multi-axial evaluation nomenclature and code	numbers.)			
I				
III IV				
V				
PLEASE RESPOND TO ALL ITEMS. USE ADDITIONAL PAG	FS AS NECESSARY.			
State patient's initial reason for seeking treatment. Describe how a		first manifested. Summarize previous	treatment testing, if any.	
,				
Describe patient's current condition and mental status. Include the	duration and severity impai	rments and stress factors.		
Medications: Please list current medications, dosage and dates beg	un, as well as existing or po	ssible side effects.		
Duration and Treatments: Please summarize current treatment goals	s and estimated duration of	treatment to achieve stated goals		
buration and incutionts. I least summarize current deathers goals	s and estimated duration of	treatment to demove stated godis.		
Comments				

Long Term Disability Claim Form Supplemental Attending Physician's Statement (continued)



	FUNCTIONAL CAPACITIES EVALUATION								
	Based on your evaluation of the claimant's psychiatric status, please give your opinion as to the extent of the claimant's ability to do the following on a sustained basis. No impairment in this area. Mild: Suspected impairment of slight importance which does not affect functionality ability. Moderate: Impairment affects but does not preclude ability to function. Moderately Severe: Impairment significantly affects ability to function. Severe: Extreme impairment of ability to function.								
1	Ability to relate to other people.	□None	Mild	□ Moderate	☐ Moderately Severe	Severe			
2	Restriction of daily activities, e.g. ability to attend meetings, socialize with others, attend to personal needs, etc.	□None	□Mild	□ Moderate	☐ Moderately Severe	□ Severe			
3	Deterioration of personal habits.	□None	□Mild	□Moderate	☐ Moderately Severe	Severe			
4	Constriction of interests.	□None	□Mild	□ Moderate	☐ Moderately Severe	☐ Severe			
5	Understand, carry out, and remember instructions.	□None	□Mild	□ Moderate	☐ Moderately Severe	☐ Severe			
6	Respond appropriately to supervision.	□None	□Mild	□ Moderate	☐ Moderately Severe	☐ Severe			
7	Perform work requiring regular contact with others.	□None	□Mild	□ Moderate	☐ Moderately Severe	☐ Severe			
8	Perform work where contact with others will be minimal.	□None	□Mild	□ Moderate	☐ Moderately Severe	☐ Severe			
9	Perform tasks involving minimal intellectual effort.	□None	Mild	□ Moderate	☐ Moderately Severe	☐ Severe			
10	Perform intellectually complex tasks requiring higher levels of reasoning, math and language skills.	☐ None	Mild	□ Moderate	☐ Moderately Severe	Severe			
11	Perform repetitive tasks.	☐ None	Mild	Moderate	☐ Moderately Severe	☐ Severe			
12	Perform varied tasks.	☐ None	Mild	Moderate	☐ Moderately Severe	☐ Severe			
13	Makes independent judgments.	□ None	☐ Mild	Moderate	☐ Moderately Severe	Severe			
14	Supervise or manage others.	□ None	Mild	□ Moderate	☐ Moderately Severe	☐ Severe			
15	Perform under stress when confronted with emergency, critical, unusual or dangerous situations; or situations in which working speed and sustained attention are make or break aspects of the job.	□None	□Mild	□ Moderate	☐ Moderately Severe	Severe			
Physi X	cian signature				Date (mm/dd/yyyy)				

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