Companion Life

DISABILITY INSURANCE CLAIM FORM

P.O. Box 100102 • Columbia, South Carolina 29202-3102
803-735-1251 Ext. 45922 • 800-753-0404
803-754-1153 (Claims Fax) • CompanionLife.com

FRAUD WARNING: ***Any person who knowingly, and with intent to injure, defraud or deceive any insurance company, files a statement of claim containing any false, incomplete or misleading information is guilty of a felony.***

To prevent delays, complete claim in its entirety. Incomplete claims will be returned.

PART I – INSURED INFORMATION

1. **Insured's Name** First / Middle / Last	2. ID Number	3. Date of Birth Mo. / Day / Yr.
4. Insured's Address Street / City / State / ZIP		
5. Insured's Sex ☐ Male ☐ Female	6. Job Description and Duties	

7. If disability is due to an accident, did injury occur at work? ☐ Yes ☐ No, If yes, have you filed a Workers Compensation claim? ☐ Yes ☐ No

8. I AUTHORIZE ANY PHYSICIAN, MEDICAL PRACTITIONER, HOSPITAL, CLINIC, DRUG AND ALCOHOL TREATMENT FACILITY, OTHER HEALTH FACILITY, CONSUMER REPORTING AGENCY, THE MEDICAL INFORMATION BUREAU, SOCIAL SECURITY ADMINISTRATION, INSURANCE OR REINSURANCE COMPANY, OR EMPLOYER TO RELEASE ANY AND ALL MEDICAL AND NON-MEDICAL INFORMATION ABOUT ME IN ITS POSSESSION TO COMPANION LIFE INSURANCE COMPANY OR ITS LEGAL REPRESENTATIVES. MEDICAL INFORMATION MEANS ALL INFORMATION IN THE POSSESSION OF OR DERIVED FROM PROVIDERS OF HEALTH CARE REGARDING MY MEDICAL HISTORY, MENTAL OR PHYSICAL CONDITION, OR TREATMENT. I UNDERSTAND THAT COMPANION LIFE WILL NOT RELEASE ANY INFORMATION OBTAINED TO ANY PERSON OR ORGANIZATION EXCEPT TO REINSURANCE COMPANIES, THE MEDICAL INFORMATION BUREAU, OR OTHER PERSONS OR ORGANIZATIONS PERFORMING BUSINESS OR LEGAL SERVICES IN CONNECTION WITH MY APPLICATION, CLAIM, OR AS MAY BE LAWFULLY PERMITTED, OR AS I MAY FURTHER AUTHORIZE. I KNOW THAT I MAY REQUEST AND RECEIVE A COPY OF THIS AUTHORIZATION. I AGREE THAT A PHOTOCOPY OF THIS AUTHORIZATION SHALL BE AS VALID AS THE ORIGINAL. I AGREE THAT THIS AUTHORIZATION SHALL BE VALID FOR THE DURATION OF MY CLAIM.

SIGNATURE OF EMPLOYEE _____ PHONE NO. ( ) _____ DATE _____

PART II – PHYSICIAN INFORMATION

9. Date first treated for this disability Mo. / Day / Yr.	10. Dates certified disabled and unable to work From: Mo. / Day / Yr. Thru Mo. / Day / Yr.	11. If hospitalized, date admitted Mo. / Day / Yr.

12. Nature of Disability ☐ Accident ☐ Sickness ☐ Maternity (If Accident or Maternity, please complete reverse side of this form.)

13. Diagnosis	14. Diagnosis Code	15. Prognosis

16. **Physical Findings** (*list all test results, or enclose test)*

Test _____ Date _____ Results _____

Test _____ Date _____ Results _____

Blood Pressure (Systolic) _____ (Diastolic) _____ (Date) _____

Remarks: _____

TREATMENT

Date of onset of this condition? _____ List all dates of treatment for this condition since patient ceased work _____

_____ Date of next office visit_____

Has patient been referred to any other physician ☐ Yes ☐ No Date(s) _____

If "Yes," name and address _____ Specialty _____

Nature of treatment for this condition *(including surgery/medications)* _____

_____

Was patient hospitalized for this condition? ☐ Yes ☐ No If "Yes," date(s) admitted_____ date(s) discharged

Name and address of hospital(s) _____

Was surgery performed? ☐ Yes ☐ No If "Yes," Date _____ Procedure _____ CPT Code _____

Progress *(please check one)* ☐ Recovered ☐ Improved ☐ Unchanged ☐ Retrogressed

17. **IMPAIRMENT**

What are the patient's current physical limitations and restrictions?

- ☐ No limitation of functional capacity; capable of heavy work, no restrictions. (Lifting 100 lbs. maximum with frequent lifting and/or carrying objects weighing up to 50 lbs.)
- ☐ Medium manual activity. (Lifting 50 lbs. maximum with frequent lifting and/or carrying of objects weighing up to 25 lbs.)
- ☐ Slight limitation of functional capacity; capable of light work. (Lifting 20 lbs. maximum with frequent lifting and/or carrying of objects weighing up to 10 lbs. Even though the weight lifted may be only a negligible amount, a job is in this category when it involves sitting most of the time with a degree of pushing and pulling of arm and/or leg controls, or when it requires walking or standing to a significant degree.)
- ☐ Moderate limitation of functional capacity; capable of clerical/administrative (sedentary) activity. (Lifting 10 lbs. maximum and occasionally lifting and/or carrying articles. Although a sedentary job is defined as one which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties.)
- ☐ Severe limitation of functional capacity; incapable of minimal (sedentary) activity.

What is the psychiatric impairment *(if applicable)*?

- ☐ Inadequate information to make assessment.
- ☐ Essentially good functioning in all areas. Occupationally and socially effective.
- ☐ Slight difficulty in occupational functioning, but generally functioning well. Has some meaningful interpersonal relationships.
- ☐ Moderate impairment in occupational functioning. Limited in performing some occupational duties.
- ☐ Major impairment in several areas – work, family relations. Avoidant behavior, neglects family, is unable to work.
- ☐ Inability to function in almost all areas.

SEE REVERSE SIDE OF FORM

DETAILS OF ACCIDENT OR MATERNITY CLAIM – TO BE COMPLETED BY THE PHYSICIAN

18-A. ACCIDENT:

On what date was the patient injured? _____

Where (place) was the patient injured? _____

How was the patient injured? _____

18-B. MATERNITY:

Estimated Date of Delivery (EDC) _____

Prenatal Complications _____

Date of Delivery _____

Post-partum Complications _____

19. I have treated the insured for the condition listed and, for the period claimed. The insured has been under my continuous care.

Physician's Name and Address (Please type or print.)

Phone No. (Indicate area code.) _____

Date _____

Physician's Signature _____

Has the above patient been released to return to work?

☐ Yes Date to Return (Mo./Day/Yr.) _____

☐ No Approximate Date of Return (Mo/Day/Yr.) _____

☐ No Will not return to work. Disability is total and permanent.

☐ Date of Next Office Visit _____

PART III – EMPLOYER INFORMATION

20. Workers' Compensation: Is there possible Workers' Compensation liability? ☐ Yes (If yes, complete this section.) ☐ No

Date accident/sickness reported _____ Date Workers' Compensation claim filed _____

Current status of Workers' Compensation claim: ☐ Approved ☐ Denied ☐ Pending ☐ Not Filed

Name and Address of Workers' Compensation Payment Office _____

21. A. Will employee receive salary continuation, PTO, sick leave, vacaction, etc.? ☐ Yes ☐ No

If Yes, please provide dates from _____ to _____.

B. Is employee subject to child support withholdings? ☐ Yes ☐ No If Yes, provide appropriate documentation with claim.

22. Is employee enrolled in the Companion Long Term Disability plan? ☐ Yes ☐ No

If "Yes," effective date: _____

23. Name and Address of Group	Phone No. and Area Code	24. Group No.

25. I certify that the above insured was a full-time active employee and that he or she did not perform any duties pertaining to his or her occupation during the period claimed above in block 10.

Employer's Signature _____ Date _____

Email Address _____

26. First Day Not at Work			27. Date Returned to Work			28. Amount of Weekly Earnings:	29. Amount of Weekly Benefit
Mo.	Day	Yr.	Mo.	Day	Yr.		
						$ _____	$ _____

INSTRUCTIONS FOR FILING CLAIM FOR WEEKLY DISABILITY BENEFITS

The reverse of this form should be completed by the insured employee, the employer and the insured's attending physician as soon as possible after the onset of the accident or sickness for which claim is made. If accident or maternity, details must be stated above. If employee is 65 or older, please provide payroll records three months prior to last day worked.

The date we need a doctor's statement of continuing disability will be indicated on the check stub each week. To prevent delays in weekly disability payments, submit the doctor's statement to Companion Life 10 days before this date occurs.

Weekly disability checks are mailed to the employer's address.

Please allow three business days from date of receipt for processing. When your employee returns to work, please call our Claims department to notify us immediately and then follow up with the final claim. Notifications can be faxed to:

PHONE: 803-735-1251 Ext. 45922 FAX: 803-754-1153

Claims should be forwarded to:

Companion Life Insurance Company
Attention: Claims Department
P.O. Box 100102
Columbia, South Carolina 29202-3102

By furnishing this blank form and investigating the claim, Companion Life Insurance Company shall not be held to admit the validity of any claim, or to waive or breach any terms or conditions of the policy.