WORKING TOGETHER FOR SASKATCHEWAN

www.sgeu.org

1440 Broadway Avenue, Regina, SK S4P 1E2 (p) 522.8571 1.800.667.5221 (f) 352.1969

1114-22nd Street West, Saskatoon, SK S7M OS5 (p) 652.1811 1.800.667.9791 (f) 664.7134

33-11th Street West, Prince Albert, SK S6V 3A8 (p) 764.5201 1.800.667.9355 (f) 763.4763

Saskatchewan Government and General Employees' Union

REGINA HEAD OFFICE

Dear SGEU Member:

Outlined below are the names of the LTD Plan staff members and the roles they perform. All staff members are based in the Regina Office, with the exception of Marilyn Fox-Reid, who is based in the Saskatoon Office.

Shane Osberg, Director, Disability Management Services, is the contact person should you have any questions or issues about the LTD Plan and the governing policies and procedures. He can be contacted, toll-free, at 800-667-5221, ext. 204, or direct line no. 306-775-7204, or by e-mail at "sosberg@sgeu.org".

Sharon Flamont, Administrative Assistant, is the contact person for handling new claims until adjudication is complete. If you have any questions with regards to the status of your application, she can be contacted, toll-free, at 800-667-5221, ext. 213, or direct line no. 306-775-7213, or by e-mail at "sflamont@sgeu.org".

Lois Burch, Claimant Advocate, is the contact person who assists members in filling out long-term disability application forms or assists those members whose claims go into the If you have any questions, she can be contacted, toll-free, at appeal process. 800-667-5221, ext. 216, or direct line no. 306-775-7216, or by e-mail at "lburch@sgeu.org".

Wendy Sherar, Plan Advocate, is the contact person who assists members whose claims and/or appeals have been approved and there are questions or issues arising from the decision. Wendy can be contacted, toll-free, at 800-667-5221, ext. 224, or direct line no. 306-775-7224, or by e-mail at "wsherar@sgeu.org".

Myrna Wilgosh, Advocate, is the contact person who assists members who require assistance with completion of Canada Pension Plan (CPP) Disability or Pension benefit applications and to assist members whose CPP applications have been denied. Myrna can be contacted, toll-free, at 800-667-5221, ext. 873, or direct line no. 306-775-7873, or by e-mail at "mwilgosh@sgeu.org".

Diana Anderson, Rhonda Ross and Marilyn Fox-Reid are the Vocational Rehabilitation **Counsellors** providing vocational rehabilitation services to members who are able to return to work. If you have any questions or issues, Diana can be contacted, toll-free, at 800-667-5221, ext. 223, or direct line no. 306-775-7223, or by e-mail at "danderson@sgeu.org". Rhonda can be contacted, toll-free, at 800-667-5221, ext. 215, or direct line no. 306-775-7215, or by e-mail at "rross@sgeu.org". Marilyn Fox-Reid can be contacted, toll-free, at 800-667-9791, ext. 379, or direct line no. 306-653-9379, or by e-mail at "mfox-reid@sgeu.org".

Marg Tustin, Benefits Clerk, is the contact person should you have any questions regarding the payment or refund of long-term disability premiums, while receiving long-term disability benefits, while on a leave-of-absence or upon retirement. She can be contacted, toll-free, at 800-667-5221, ext. 209, or direct line no. 306-775-7209, or by e-mail at "mtustin@sgeu.org".

The SGEU LTD Plan Staff functions as a team, working to ensure that all Members' long-term disability claims are managed in an effective and timely manner. Therefore, if you contact any staff member, depending on your enquiry, your call will be directed to the appropriate staff member.

COMPLETION OF THE SGEU LONG TERM DISABILITY CLAIM FORMS

Check-off List:

Contact may be made, by the Claimant, the Claimant's Employer or the Claimant's Physician, with any SGEU LTD Plan Advocate for assistance in completion of any of the forms in the LTD application package.

- Claim for Long Term Disability Benefits (Member's Statement) Complete all areas of the form, both front and back, sign and date.
- Physician's Initial Report Form Complete Part 2, sign and date and provide to your family doctor and/or specialist to complete Parts 3 to 9. Section 3.3 MUST be completed with year/month/day. Ensure the physician attaches copies of referrals, consultations and diagnostic and test results. It is the Claimant's responsibility to pay for any costs incurred for the completion of this document.
- Job Demands Form This form is to be completed and signed by your immediate supervisor.
- Electronic Funds Transfer Form Complete the form and attach a copy of a void cheque.
- Release of Information Form No. 1 Complete this form to provide information on group life insurance.
- Release of Information Form No. 2 Complete this form for release of your LTD Claim information to a person that can speak on your behalf.
- Release of Information Form No. 3 Complete this form to enable SGEU LTD Plan and the Plan's Medical Adjudicator to acquire medical information pertinent to your long-term disability claim.
- Release of Information Form No. 4 Complete this form to provide information on pension contributions.
- Release of Information Form No. 5 Complete this form for release of your W.C.B. Claim information.

over ...

- Release of Information Form No. 7 Complete this form for release of your employment information. No medical information will be provided to your employer.
- Release of Information No. 8 Complete this form for release of your SGI Claim information.

Note:

- A non-certified copy of your birth certificate or a copy of a valid driver's licence or passport is required and should accompany your claim application.
- Upon request from the LTD Plan or the Medical Adjudicator, you will be required to apply for Canada Pension Plan disability benefits. The Plan's Medical Adjudicator will provide information on the process if you are accepted to the Plan. An SGEU LTD Advocate can also assist with completion of the application.
- If your disability is a result of a workplace injury, you MUST apply for WCB benefits, if you have not already done so. If you have already made application, submit all WCB documentation with your LTD application.
- If your disability is a result of a motor vehicle accident, you MUST apply for SGI benefits, if you have not already done so. If you have already made application, submit all SGI documentation with your LTD application.
- You may be eligible for Employment Insurance sick benefits. Contact your nearest Social Development Canada office to make application for this benefit, or visit the website at "www.sdc.gc.ca".
- You MUST use up all of your sick leave hours prior to receiving any Long Term Disability Plan income entitlements.
- You are NOT REQUIRED to use up annual vacation prior to receiving Long Term Disability Plan income entitlements.



www.sgeu.org

(p) 522.8571

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1440 Broadway Avenue, Regina, SK S4P 1E2

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Saskatchewan Government and General Employees' Union

REGINA HEAD OFFICE

Dear Member:

This letter addresses very serious matters.

- 1. DO NOT RESIGN Some members have been tempted or persuaded to resign from their jobs after having their long-term disability claim approved. Do not make any decision without the advice of your Union representative or the SGEU LTD Claimant Advocate. If you resign:
 - you are giving up your job;
 - your employer has no further obligation to you;
 - SGEU Long-Term Disability Plan has no further obligation to you; and
 - all benefits, including pension contributions, will cease at the time of your resignation.
- 2. Medical evidence regarding your claim.
 - Copies of all relevant medical information, such as physician's clinical notes, diagnostic test results and referrals and consultation letters, should be submitted with your application
 - It is your responsibility to provide medical information required for the adjudication of your claim. All costs incurred in obtaining this information are your responsibility.
- 3. Long-Term Disability premiums payments, extended health and dental benefits and life insurance queries (options in your Collective Bargaining Agreement language) should be directed to your employer's Human Resources/Payroll Department.
- 4. Elimination Period To qualify for long-term disability benefits, you must be off work for 119 consecutive days, or 85 cumulative days within the previous twelve (12) months from the date you left work. If you attempt a return-to-work, after the date you initially left work, the hours you have worked will be added to your elimination period. If you need further information on the "cumulative" or "return-to-work" elimination period, call an LTD Plan Advocate in the Regina Office.

If you have any questions regarding the SGEU LTD Plan, contact a Plan Advocate at 306-522-8571 or, toll-free, at 800-667-5221 or visit the SGEU website at "www.sgeu.org".

SGEU LTD Plan

Sincerely,

Claim for Long-Term Disability Benefits

Part 1 – MEMBER'S STATEMENT						
□ Mr. □ Mrs. □ Ms.	Last Name:	MEMBER IDENTIF	FICATION (Ple First Name:	ease Print)	Middle Initial:	
Address:		City/Town:		Province:	Postal Code:	
Social Insurance Nu	mber:	Date of Birth:		Telephone No	D: ()	
Employer:			Department:			
Job Title:			Shiftworker:	□ Yes □ No		
Describe your prese separate sheet, if ne		_	NFORMATION date. If injured		re of the accident. (Attach	
When did your health	h first become a	ffected? Date				
From what date has	your condition p	revented you from w	orking? Date			
Were you hospitalize	ed for this condit	ion? □ Yes □ No If '	YES", provide	the date(s) and ho	ospital name(s).	
When do you expect	to be able to re	turn to: a) your own o	occupation?	ate b) any o	ccupation? Date	
Indicate if you have	tried to return to	work? ☐ Full time ☐	Part-time □ U	sual job □ New Job	o/Duties	
Give dates: From: D	ate	To: Date				
ATTACH RESUME (MARY OF EDUCATION THE FOLLOWING:	ON, TRAININ	G, EXPERIENCE		
Highest Education Completed	Location	Level Obtai	ned Ye	ear	Area of Study & Years Completed	
WORK EXPERIENCE (Begin with most recent and add separate pages, if necessary.)						
Duration of Employment		Employer			Job Title	
From To						
List all specialized tr	aining not includ	led above. (Attach s	eparate paper	or resume, if neces	ssary.)	

DISABILITY INCOME

Please provide the details of any benefits w disability. Enclose copies of all corresponde entitlements (acceptance of your claim), lett	ence and documents from these insu	urers, including any	notices of
☐ Canada Pension Plan Disability Benefits	Claim No:		
Amount of Benefit:	Paid From/To: Dates		
Date Accepted/Denied: Date	Date Appealed: Date		
□ WCB Disability Benefits	Claim No:		
Amount of Benefit:	Paid From/To: Dates		
Date Accepted/Denied: Date	Date Appealed: Date		
□SGI	Claim No:		
Amount of Benefit:	Paid From/To: Dates		
Date Accepted/Denied: Date	Date Appealed: Date		
□ Other Disability Benefit(s)	Insurer's Name:		
Amount of Benefit:	Claim No:	Paid Froi	m/To: Dates
Date Applied: Date	Date Accepted/Denied: Date	Date App	ealed: Date
Insurer's Address:			
I hereby certify that the information provided deductions and the use of my Social Insural of my benefits. I hereby authorize the use of administration of my long-term disability claims shall be as valid as the original.	nce Number (if given as employee ic of all information in my file for the pur	dentification number	r) for administration on and
Dated atthi	s Day of	Month	Year
Signature of Claimant			
Address of Claimant			

PHYSICIAN'S INITIAL REPORT FORM

Part 2 – Identification and Authorization Part 2 to be completed by Member.

	, , , , , , , , , , , , , , , , , , , ,
Name and Address of Insurer:	Address of Insurer:
SGEU Long Term Disability Plan	1440 Broadway Avenue, Regina, SK S4P 1E2
Name of the Plan's Medical Adjudicator*	
Manulife Financial	
*Subject to appointment from time to time.	
Last Name of Member First Name Initial	Member's DOB (y/m/d) Member's S.I.N.
I hereby authorize the release to my insurer and to my policy	y holder of any information in respect to the settlement of this claim.
Member's Signature	Date (y/m/d)
Part 3 – History and Findings	
To provide further information on any physical disa applicable portions of this form and attach a narrat	ability or a mental health or emotional disability, complete the tive statement.
3.1 Mechanism of injury or onset of illness	
3.2 To the best of my knowledge, the illness started or the injury happened on (y/m/d).	3.3 To the best of my knowledge, the Member has been unable to work as a result of the disability from (y/m/d).
3.4 Date of first examination / treatment for the present condition (y/m/d).	3.5 Dates of hospitalization (y/m/d) From To
3.6 Physical findings	Name of hospital
3.7 Diagnostic tests ordered	3.8 Findings from diagnostic tests (Attach copies of all results.)
Part 4 – Diagnosis	
4.1 Diagnosis of Physical Illness or Injury	4.2 Diagnosis of Mental or Emotional Illness
	Is This A Workplace Issue?

Part 5 – Management Plan
5.1
[] Active treatment is required - Next Appointment Scheduled (y/m/d)
[] No Active treatment is required
5.2 Treatment initiated: (specify in each case)
Medications
Exercise/Therapy
Education/Other Treatment
The medication(s) might impair safety in the workplace for the Member or for others as follows:
5.3 Referred for assessment/treatment to (specify name and date):
[] Medical/Surgical Specialist
[] Psychiatrist
[] Counsellor
[] Physical Therapist
[] Other Therapist
[] Chiropractor
[] Other Referral
5.4 To the best of my knowledge, the Member is prepared to follow the above management plan.
[] Yes [] No (If no, explain why not.)
Part 6 – Activity Level and Prognosis
6.1 The Member is currently working? Yes [] No [] Participating in activities of daily living? Yes [] No []
6.2 The Member is unable to participate in normal activities, including work, because of limitations in one or more of the following

P

6.1 The Member is currently working? Yes [] No [] Participating in activities of daily living? Yes [] No []					
6.2 The Member is unable to participate in normal activities, including work, because of limitations in one or more of the following areas (provide explanation):					
[] Standing	!				
[] Sitting					
[] Lifting					
[] Turning					
[] Mental Function					
[] Allergies					
[] Work Environment					
[] Other					
6.3 The disability may affect activity for: Over 119 calendar days [] Unknown []					
6.4 Permanent scarring or disfigurement Yes [] No [] 6.5 Permanent functional disability is possible Yes [] No []					

Part 7 – Past History and Other Conditions

Part I – Past History and Other Conditions				
7.1 Other factors that might effect the duration of the current	t disability are:			
Addictions [] Pre-existing medical conditions [] Environm	nental [] Physical Fitness [] Far	mily [] Dietary []		
Other medical conditions [] Employment [] Psychosocial	[] Other[]			
The specifics of the above indicated factors are:				
The opening of the above indicated factors are.				
7.2 The Member previously had the same or similar condit	ion as follows:			
7.3 The following remarks might be helpful or important to	explain the Member's recovery and	d return to work:		
Part 8 – Rehabilitation				
	For Own Occupation	For Any Other Occupation		
8.1 Is Member a suitable candidate for trial employment?	Yes [] No []	Yes [] No []		
6.1 15 Member a suitable candidate for that employment:	169[] 100[]	163[] 140[]		
8.2 If "YES", when could trial employment commence?				
[] Part–time	yy/mm/dd	yy/mm/dd		
[] Full–time	yy/mm/dd	yy/mm/dd		
8.3 If "NO", provide explanation:				
8.4 Would vocational rehabilitation be recommended: Yes [[1 No [1			
Total	,] 110 []			
D 40 AU II DI II (NOTE DI II	1 O1 14 1 D ACC 1	5.1		
Part 9 – Attending Physician (NOTE: Physician	<u> </u>			
Last Name First Name Initial		Practitioner/Payee Number		
Street Address	Phone No.	Fax No.		
Town/City	Province	Postal Code		
·				
Signature		Date yy/mm/dd		
Signature		Bate yy/mmaa		

NOTE: It is the Claimant's responsibility to pay for any costs incurred for the completion of this document.



JOB DEMANDS

Job Title (Please Print):	
Department (Please Print):	_

		Employer's Statement						
JOB DEMANDS		WEIGHT FREQUENCY						
		Max	Usual	Not performed	Performed not daily	<1 hour daily	1-3 hours daily	Maximum ability
STREI	NGTH			poriormou	not daily	dany	dany	ability
Lifting-including	pushing and							
pulling effort whi Carrying-including	le stationary							
pulling effort whi	ng pusning and							
Fingering	Right							
	Left							
Handling	Right							
	Left							
Reaching	Below Shoulder							
	Above							
	Shoulder							
Gripping	Minimum							
	Moderate							
	Maximum							
MOBILITY								
Throwing								
Sitting								
Standing								
Walking								
Running								
Climbing								
Stooping								
Crouching								
Kneeling								
Crawling								
Twisting								
SENSORY / PERCEPTUAL	Conversation							
Hearing	Other sounds							
	Far							
Vision	Near							
VISIOII	Colour							
	Depth							
Reading								
Writing								
Speech								

	Employer's Statement							
	WE	IGHT		FREQUENCY				
JOB DEMANDS	Max	Usual	Not performed	Performed not daily	<1 hour daily	1-3 hours daily	Maximum ability	
ENVIRONMENT								
Inside Work								
Hot								
Cold								
Humid								
Dry								
Dust								
Vapour, Fumes								
HAZARDS								
Moving Objects								
Hazardous machines								
Electrical hazards								
Sharp tools, etc.								
Radiant energy								
Slippery floors								
Cluttered worksite								
JOB STRESSORS /								
CONDITIONS OF WORK								
Travel								
Working on call								
Working overtime								
Shift work								
Equipment/machinery/vehicle operation								
Deadlines to be met								
Work with public								
Speak with public								
Speak to groups								
Work independently								
Work in isolation								
Physical mobility in work								
Depend on others for information								
Boredom								
Decision making								
Other								
Member's Comments:								
Weinber 3 Comments.								
Member's Signature:								
Supervisor's Name:			Offici	al Title:				
Supervisor's Signature:			Date:				· · · · · · · · · · · · · · · · · · ·	

Electronic Funds Transfer Form

☐ New Enrolment

Advice of Change

	Plan M	lember Inform	ation - Please Print	
Plan Number	Identification Number Plan Name			
1151			SGEU Long Term Disability	Plan
Plan Member (First Na	me)	Initial	Plan Member (Last Name	e)
Street Address	Ci	ity or Town	Province	Postal Code
Home Telephone Num	ber: ()		Business Telephone Number: ()	
	Ban	king Information	on - Please Print	
Instructions:				
Please have your bank l voided cheque.	oranch office verify the	bank section befo	re returning to the company address. If po	ossible, attach a
Advise us promptly of a	ny change of bank, bra	nch or account nu	nber.	
This form authorizes de account.	posits to the account an	nd does not authori	ze withdrawals or any other transactions	with respect to the
	All information s	ubmitted will be tr	eated as private and confidential	
Name of Bank / Financia	l Institution			
Street Address		City or Town	Province	
Postal Code	Institution Number	Transit Number	Account Number	
	0			
		Authoriz	ation	
I hereby authorize Manu this agreement.	life Financial to use the Ele	ectronic Funds Trai	nsfer system until written instructions are	issued cancelling
Plan Member Signature			Date (D/M/Y)	

FORM NO. 1

I HEREBY AUTHORIZE THE RELEASE OF ANY INFORMATION REGARDING MY GROUP LIFE INSURANCE PLAN AND EXTENDED HEALTH AND DENTAL INSURERS, REQUESTED BY THE LIFE AND EXTENDED HEALTH AND DENTAL INSURANCE COMPANY OR ANY SUCCESSOR ADMINISTERING SAID GROUP LIFE PLAN.

MEMBER'S NAME	
SIGNATURE	
SIGNATURE	
DATE	

FORM NO. 2

I HEREBY AUTHORIZE AND DIRECT THE SGEU LONG TERM DISABILITY PLAN AND/OR THE PLAN'S MEDICAL ADJUDICATOR TO RELEASE TO:

NAME (SPOUSE/FAMILY/OTHER)	TELEPHONE NUMBER
ANY SGEU LTD PLAN BENEFIT OR MI MAY HAVE BEEN ACQUIRED DURING TERM DISABILITY PLAN CLAIM.	
MEMBER'S NAME	
SIGNATURE	
DATE	

FORM NO. 3

I HEREBY AUTHORIZE AND DIRECT ANY PHYSICIAN, SURGEON, HOSPITAL AND/OR ANY OTHER HEALTH CARE PROVIDER, WHO HAS EXAMINED OR TREATED ME, TO RELEASE TO THE SGEU LONG TERM DISABILITY PLAN AND/OR THE PLAN'S MEDICAL ADJUDICATOR ANY INFORMATION WHICH MAY HAVE BEEN ACQUIRED IN THE COURSE OF SUCH EXAMINATION OR TREATMENT.

I UNDERSTAND THAT THIS INFORMATION IS TO BE USED FOR THE SOLE PURPOSE OF MY APPLICATION FOR AND RECEIPT OF SGEU LONG TERM DISABILITY PLAN BENEFITS.

MEMBER'S NAME	
SIGNATURE	
DATE	

FORM NO. 4

I HEREBY AUTHORIZE AND DIRECT THE SGEU LONG TERM DISABILITY PLAN AND/OR THE PLAN'S MEDICAL ADJUDICATOR TO OBTAIN ANY INFORMATION REGARDING MY PENSION CONTRIBUTIONS FOR THE PURPOSES OF ADMINISTERING MY CLAIM.

MEMBER'S NAME	
SIGNATURE	
SIGNATURL	
DATE	

FORM NO. 5

I HEREBY AUTHORIZE AND DIRECT THE SGEU LONG TERM DISABILITY PLAN TO OBTAIN ANY INFORMATION, FROM SASKATCHEWAN WORKERS' COMPENSATION BOARD, REGARDING MY WORKERS' COMPENSATION BOARD APPLICATION FOR ENTITLEMENT AND THE DECISION ON SUCH APPLICATION.

MEMBER'S NAME
SIGNATURE
DATE

FORM NO. 6

	BILITY	PLAN	AND/C	OR THE	IRECT PLAN'S MATION	MEDI	CAL A	DJUDIC	
	TUE	SOLE	DUDD	ase of	ADVO	CATINI	_, TC		USED
THRO		THE A	APPEAI		ESS OF				
							_		
MEM	BER'S	NAME							
SIGN	ATURI	Ē					-		
DATE							-		

FORM NO. 7

I HEREBY AUTHORIZE THE RELEASE OF ANY EMPLOYMEN' INFORMATION BETWEEN THE SGEU LTD PLAN AND M' EMPLOYER:
THAT IS REQUIRED FOR THE PURPOSES OF ADMINISTERING THE BASIC INFORMATION FORM.
MEMBER'S NAME
SIGNATURE
DATE

FORM NO. 8

I HEREBY AUTHORIZE AND DIRECT THE SGEU LONG TERM DISABILITY PLAN TO OBTAIN ANY INFORMATION, FROM SASKATCHEWAN GOVERNMENT INSURANCE, REGARDING MY SASKATCHEWAN GOVERNMENT INSURANCE APPLICATION FOR ENTITLEMENT AND THE DECISION ON SUCH APPLICATION.

MEMBER'S NAME	
SIGNATURE	
DATE	