

**Check List for the Completion of
The SGEU Long Term Disability Claim Forms**

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. This date should reflect the day after your last physical day at work.**
 - ❑ 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 or a bank authorization form.
- ❑ **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.**
- ❑ Release of Information # 1 - Complete this form to provide information on group life, extended health and dental insurance.
- ❑ Release of Information # 2 - Complete this form for release of your LTD Claim information to a person that can speak on your behalf.
- ❑ Release of Information # 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 # 4.1, 4.2 or 4.3 - Complete the applicable form to provide information on pension contributions and/or status.
- ❑ Release of Information # 5 - Complete this form for release of your W.C.B. Claim information.
- ❑ Release of Information # 7 – Complete this form for release of your employment information. No medical information will be provided to your employer.
- ❑ Release of Information # 8 – Complete this form for release of your SGI Claim information.
- ❑ Release of Information # 9 – Complete this form for SGEU LTD Plan and the plan's medical adjudicator to enable contact electronically (via email).

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Notes:

- **As per Article 11.1 of the SGEU LTD Plan you must submit your LTD application within one year of date of disability. In addition to the below requirements you should submit your Long Term Disability application within the elimination period.**

- 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.