

## THE HARTFORD DISABILITY

### Exclusions That Apply to Short or Long Term Disability

Short or Long term disability coverage does NOT cover occupational illness or occupational injuries.

**\*\*PLEASE MAKE SURE YOU READ THE NEXT PAGE AS IT CONTAINS IMPORTANT INFORMATION ABOUT YOUR DISABILITY CLAIM\*\***

Pages 1-8 : Employee

Pages 9-10 : BISD

Pages 11-12 : Physician

### Your elected waiting period is indicated below

(THIS IS THE NUMBER OF CONSECUTIVE DAYS YOU MUST BE OUT OF WORK BEFORE BENEFITS ARE PAYABLE.)

ACCIDENT	SICKNESS	OPTION
0	7	1
14	14	2
30	30	3
60	60	N/A

**Your Elected Amount** \$

Benefit Is Paid Based On The Attending Physician Statement.

**\*\*Checks are mailed the Last Wednesday of the month\*\***

-The Hartford takes 15-21 BUSINESS DAYS to make a determination once a COMPLETE PACKET has been received. (This excludes any additional information that would be needed to make the final determination.)

**Your waiting period may be waived if you qualify for the 1<sup>st</sup> day hospital benefit.**

**This waiver only included in options 1, 2, &3.**

**SEE PROVISION BELOW AS STATED IN YOUR GROUP DISABILITY SUMMARY OF BENEFITS.**

“This feature waives the waiting period if any insured is hospitalized. HOSPITALIZED means that because of your disability you are hospital confined on an INPATIENT basis; then benefits begin the first day of inpatient confinement. (AN OBSERVATION ROOM OR UNIT DOES NOT MEET THIS REQUIERMENT)

Inpatient means you are confines to a hospital room due to your sickness or injury for 24 or more consecutive hours for which you are charged a room or board. You must provide the itemized bill from the hospital showing a room charge. If there is no room charge you will not qualify for the waiver.

**IF YOU ARE HAVING BARIATRIC SURGARY YOU MUST ALSO PROVIDE THE LETTER OF APPROVAL FROM YOUR INSURANCE COMPANY STATING SURGERY WAS APPROVED DUE TO MEDICAL NESCESSITY**

To speak with your assigned The Hartford Disability Benefit Processor for more detail, claim status & benefit payments; call 1-888-301-5615

# BENEFIT PLAN

Educator Hybrid Long Term Disability Plan

Prepared Exclusively for



What Your Plan  
Covers and How  
Benefits are Paid

## Other Income Benefits

Other income benefits can affect the monthly benefit described in the long term disability coverage section. When calculating the benefit payable, other income benefits that you, your spouse, your children or your dependents are eligible for because of your disability or retirement are taken into consideration.

**After the first 6 months of disability payments, other income benefits considered when your benefits payable are calculated include:**

- Disability, retirement or unemployment benefits required or provided for by government law. This includes (but is not limited to):
  - Unemployment compensation benefits.
  - Automobile no-fault wage replacement benefits required by law.
  - Benefits under the Federal Social Security Act, Railroad Retirement Act, Canada Pension Plan and Quebec Pension Plan.
  - Veteran's benefits.

## Recovery of Overpayments Long Term Disability Coverage

If payments are made in amounts greater than the benefits that you are entitled to receive, Aetna has the right to do any one or all of the following:

- Require you to return the overpayment on request;
- Stop payment of benefits until the overpayment is recovered;
- Take any legal action needed to recover the overpayment; and
  - Place a lien, if not prohibited by law, in the amount of the overpayment on the proceeds of any other income, whether on a periodic or lump sum basis.

## Exclusions That Apply to Long Term Disability

Long term disability coverage does not cover any disability on any day that you are confined in a penal or correctional institution for conviction of a criminal act or other public offense. You will not be considered to be disabled, and no benefits will be payable.

**Long term disability coverage also does not cover any disability that:**

- Is due to occupational illness or occupational injury.
- Is due to insurrection, rebellion, or taking part in a riot or civil commotion.
- Is due to intentionally self-inflicted injury (while sane or insane).
- Is due to war or any act of war (declared or not declared).
- Results from your commission of, or attempting to commit a criminal act.
- Results from a motor vehicle accident caused by operating the vehicle while you are under the influence of alcohol.

## Schedule of Benefits

### Maximum Benefit Duration\*

- If your period of disability starts prior to the date you reach age 60, it will end the last day of the calendar month in which you reach age 65, after the elimination period is met.
- If your period of disability starts on or after the date you reach age 60, it will end with the expiration of 60 months of disability, after the elimination period is met.

\*Unless your disability ends earlier for one or more of the reasons stated in your Booklet-Certificate.

**HARTFORD LIFE INSURANCE COMPANY  
HARTFORD LIFE AND ACCIDENT INSURANCE COMPANY**



**Employee's Statement**

To be completed by the Employee (BE SURE TO ANSWER ALL QUESTIONS - FAILURE TO DO SO MAY DELAY YOUR CLAIM)

**A. Information about you**

Last Name:	First Name:	Middle Initial:	Date of Birth:	Social Security Number:
Address: (Street, City, State & Zip Code)				Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female
E-Mail Address: E-Mail is used to provide The Hartford At Work registration instructions and important status updates.				
Personal Cell Telephone Number: ( )		Alternate Telephone Number: ( )		
May we have your authorization to leave confidential medical and benefit information on your personal cell phone? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Signature		Date		
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		Your employer: (include division, if applicable)		Occupation:
When your disability began, did you have more than one employer (includes self-employment)? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," please provide the name, address and phone number of that employer. Indicate the dates when you worked (or were self-employed).				
Please indicate the extent of your formal education: (Check one) <input type="checkbox"/> HS/GED <input type="checkbox"/> Trade School/Certification Program <input type="checkbox"/> AA/AS <input type="checkbox"/> BA/BS <input type="checkbox"/> Masters <input type="checkbox"/> Doctorate <input type="checkbox"/> Some college <input type="checkbox"/> Other List all licenses, certifications, majors				
Have you served in the military? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Briefly describe your past work experience for the last 20 years (Begin with your most recent job.)				
Dates Employed	Employer	Job Title	Duties	
Now, or at some time in the future, would you be interested in seeking rehabilitation to some other kind of work? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Have you contacted your State Department of Vocational Rehabilitation? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," please include the name, address and telephone number of your counselor.				

**B. Information About your Family** (required to determine your eligibility for Social Security Benefits)

Legal Spouse's Name: (Last, First)			
Legal Spouse's Social Security Number:	Date of Birth: (Month/Day/Year)	Is your legal spouse employed? <input type="checkbox"/> Yes <input type="checkbox"/> No	Retired? <input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any children under Age 19? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," please provide the information requested below for each child.			
Name:	Date of Birth:	Social Security Number:	
Name:	Date of Birth:	Social Security Number:	
Name:	Date of Birth:	Social Security Number:	
Do you have any children with disabilities (regardless of age)? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," please provide the information requested below for each child			
Name:	Date of Birth:	Social Security Number:	
Name:	Date of Birth:	Social Security Number:	

**C. Information About the Condition Causing Your Disability**

**1a. For illness, answer the following questions:**

What were your first symptoms?	
When did you first notice them?	Have you had this illness before? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, when?

**C. Information About the Condition Causing Your Disability (cont'd...)**

**1b.** Next to any Activity of Daily Living (ADL), please place the number shown next to the statement that most accurately reflects your ability/inability to perform each: 1 = I can perform this activity independently; 2 = I can perform this activity with the use of equipment or adaptive devices; 3 = I cannot perform this activity.

- |                                    |  |
|------------------------------------|--|
| ( ) Bathe (tub, shower, or sponge) | ( ) Transfer from Bed to Chair   |
| ( ) Dress                          | ( ) Voluntary bladder and bowel control or ability to maintain a reasonable level of personal hygiene. |
| ( ) Toilet                         | ( ) Feed yourself with food that has been prepared and made available to you.                          |

If you indicated (3) for any of the above activities, please describe the impairment and restrictions to your functionality that preclude you from performing this activity.

Height: \_\_\_\_\_ Weight: \_\_\_\_\_

Have you suffered a severe Cognitive Impairment that renders you unable to perform common tasks, such as using the phone, money management, or medication management? ☐ Yes ☐ No If "Yes," describe:

**2. For an injury, answer the following questions:**

When, where and how did the injury occur?

**3. For Illness, Injury or Pregnancy, answer the following questions:**

Date you were first treated by a Healthcare Provider?

Name of Healthcare Provider:

(Month/Day/Year)

Address of Healthcare Provider:

Before you stopped working, did your condition require you to change your job, or the way you did your job? ☐ Yes ☐ No If "Yes," explain:

What aspect of your condition made you unable to work?

Is your condition related to work activities or your workplace? ☐ Yes ☐ No If "Yes," explain:

Have you filed, or do you intend to file a Workers' Compensation claim? ☐ Yes ☐ No

**D. Information About the Disability**

Last day you worked before the disability:

(Month/Day/Year)

Did you work a full day? ☐ Yes ☐ No If "No," explain.

Since that date, have you done any work? ☐ Yes ☐ No If "Yes," please indicate dates worked, name of employer, and amount earned.

Date you were first unable to work:

(Month/Day/Year)

If you have not returned to work, do you expect to? ☐ Yes ☐ No Part time \_\_\_\_\_ (date) Full time \_\_\_\_\_ (date)

**E. Information About Healthcare Providers and Hospitals**

**First medical attention for the current disability was given by (complete below)**

Healthcare Provider's Name:

Telephone: ( )

Specialty:

Fax: ( )

Address: (Street, City, State & Zip)

Dates seen: \_\_\_\_\_ to \_\_\_\_\_

**List all Healthcare Providers and Hospitals you have seen for this condition (attach separate sheet, if needed)**

Healthcare Provider's Name:

Telephone: ( )

Specialty:

Fax: ( )

Address: (Street, City, State & Zip)

Dates seen: \_\_\_\_\_ to \_\_\_\_\_

Hospital:

Address: (Street, City, State & Zip)

Dates of Confinement: \_\_\_\_\_ to \_\_\_\_\_

**E. Information About Healthcare Providers and Hospitals (Cont...)**

Have you consulted any other Healthcare Provider or been hospitalized in the past three years? ☐ Yes ☐ No  
 If "Yes," complete the following concerning your past treatment (attach separate sheet, if needed)

Healthcare Provider's Name:	Telephone (    ) Fax: (    )	Specialty
Address (Street, City, State, Zip)		Dates seen to
Hospital		
Address (Street, City, State, Zip)		Dates of Confinement to

**F. Other Income**

Check the other income benefits you have received/are receiving, or are eligible to receive during your disability (complete the information requested).

Source of Income	Amount (week /month)	Date Claim was filed	Date Payments began	Date Payments ended
Social Security: Disability/Retirement	\$ _____ / _____	_____	_____	_____
Social Security: Widow's/Widower's	\$ _____ / _____	_____	_____	_____
Sick Pay or Salary continuation	\$ _____ / _____	_____	_____	_____
Income from Work	\$ _____ / _____	_____	_____	_____
Workers' Compensation	\$ _____ / _____	_____	_____	_____
State Disability	\$ _____ / _____	_____	_____	_____
Pension: Disability/Retirement	\$ _____ / _____	_____	_____	_____
Public Employee/State Teacher: Retirement/Disability	\$ _____ / _____	_____	_____	_____
Short Term Disability	\$ _____ / _____	_____	_____	_____
Unemployment	\$ _____ / _____	_____	_____	_____
No-Fault Insurance	\$ _____ / _____	_____	_____	_____
Other (include individual Group Benefits or Veteran's Benefits)	\$ _____ / _____	_____	_____	_____

Are you paying for Medicare Part D? ☐ Yes ☐ No If "Yes," please enter amount: \_\_\_\_\_ .00.

**G. Information about Tax Withholding**

Federal law requires us to withhold federal income tax from your check if you request us to do so. We are also required to send a report to your employer at the end of each calendar year showing your name, total amount of benefits paid to you, total amount withheld, if any, and your social security number. If you want us to withhold tax, please indicate on the line below the dollar amount to be withheld per benefit check. Whole dollars only (minimum is \$88.00 per month): \$ \_\_\_\_\_ .00. **IMPORTANT:** If you pay the entire cost of the LTD premium, but on a Post-tax basis per Section I, Part D of the Employer's Statement, you will not be able to request any federal income tax withholding from your check. Puerto Rico residents may not request withholding.

**Note to residents of Iowa and the District of Columbia:** Should you choose federal income tax withholding, your state requires us to withhold state income tax. We must withhold at a state mandated rate (which may be higher than you need) until we receive a signed state Tax Withholding Certificate from you. Please contact your employer or state Tax Department to obtain the proper withholding form.

**Note to residents of Nebraska, Rhode Island and South Carolina:** Should you choose federal income tax withholding, your state requires us to withhold state income tax. We must withhold at a state mandated rate (which may be higher than you need) until we receive a signed federal Form W-4, Employee's Withholding Allowance Certificate, from you. You may go to [www.irs.gov](http://www.irs.gov) to obtain the proper withholding form.



With the exception of any source(s) of income reported above in this form, I certify by my signature that I have not received and am not eligible to receive any source of income, except for my disability benefits from this plan. Further, I understand that should I receive income of any kind or perform work of any kind during any period The Hartford has approved my disability claim, I must report all details to The Hartford, immediately. If I receive disability income benefits greater than those which should have been paid, I understand that I will be required to provide a lump sum repayment to the Plan. The Hartford has the option to reduce or eliminate future disability payments in order to recover any overpayment balance that is not reimbursed.

**For residents of all states EXCEPT Arizona, Alabama, California, Colorado, Florida, Kentucky, Maine, Maryland, New Jersey, New York, Ohio, Oklahoma, Oregon, Pennsylvania, Puerto Rico, Tennessee, Virginia and Washington:** 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.

**For Residents of 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.

**For Residents of Alabama:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or who knowingly presents false information in an application for insurance is guilty of a crime and may be subject to restitution fines or confinement in prison, or any combination thereof.

**For Residents of California:** For your protection, California law requires the following to appear on this form: Any person who knowingly presents 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.

**For residents of 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 award payable from insurance proceeds shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

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

**For residents of Kentucky:** Any person who knowingly and with intent to defraud any insurance company or other person files a statement of claim or an application for insurance 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.

**For residents of Maine, Tennessee, 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 and denial of insurance benefits.

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

**For residents 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. Any person who includes any false or misleading information on an application for insurance policy is subject to criminal and civil penalties.

**For residents 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.

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

**For residents of 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.

**For residents of Oregon:** 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 that the insurer relied upon is subject to a denial and/or reduction in insurance benefits and may be subject to any civil penalties available.

**Signature - Please read the statement that applies to your state of residence and sign the bottom of the page.**

**For residents 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 hereto commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

**For residents of Puerto Rico:** Any person who knowingly and with the intention of defrauding presents false information in an insurance application, or presents, helps, or causes the presentation of a fraudulent claim for the payment of a loss or any other benefit, or presents more than one claim for the same damage or loss, shall incur a felony and, upon conviction, shall be sanctioned for each violation by a fine of not less than five thousand dollars (\$5,000) and not more than ten thousand dollars (\$10,000), or a fixed term of imprisonment for three (3) years, or both penalties. Should aggravating circumstances be present, the penalty thus established may be increased to a maximum of five (5) years, if extenuating circumstances are present, it may be reduced to a minimum of two (2) years.

**For residents of Virginia:** Any person who, with the intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement may have violated the state law.

The statements contained in this form are true and complete to the best of my knowledge and belief.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Electronic Funds Transfer (EFT) is our standard method of payment. When making our claim decision we may contact you to obtain your banking information.



## AUTHORIZATION TO OBTAIN AND DISCLOSE INFORMATION

I allow all doctors, hospitals, other health care providers, pharmacy, pharmacy benefit managers, government agencies (including, but not limited to, Federal, State or Local, and the Social Security Administration and Veterans Administration), insurers, employers, financial institutions, educational institutions, health plans, health insurance carriers, policyholders, contract holders, vendors, health and benefit insurers and administrators or their successors ("Records Holders") to give to and discuss with The Hartford, the following personal, private, or privileged information, records, or documents:

Any and all medical information or records, including medical histories, physical, mental, or diagnostic examinations, pharmaceutical records, and treatment notes, and including information regarding HIV/AIDS, communicable diseases, alcohol or drug abuse, and mental health; work and performance information and history, including job duties and earnings; information on any insurance coverage and claims filed, including all records and information related to such coverage and claims; financial information, including pension benefits and bank records; business transaction billing and payment records; academic transcripts; and any and all information concerning Social Security or other government benefits, including monthly benefit amounts, monthly payment amounts, entitlement dates, and information from my Master Beneficiary Record. The information obtained by use of this Authorization will be used by The Hartford (including subsidiaries and affiliates) for the purpose of evaluating and administering my claim(s) for benefits and /or leave request(s) and/or request(s) for accommodation. Such information shall be referred to herein collectively as "My Information."

I understand that once My Information has been disclosed to The Hartford as permitted under this Authorization, it may be re-disclosed by The Hartford as permitted by law or my further authorization. I authorize The Hartford to use or disclose My Information (i) to my employer for: a) functions related to accommodating my restrictions/limitations, including in accordance with law; b) responding to claims related to accommodation, adverse or discriminatory treatment related to my claim or condition; c) responding to complaints by me or my representative relating to benefits, leave or accommodation; d) responding to any litigation, agency or regulatory proceeding, or lawful subpoena (including regarding employment claims); e) federal, state, or other leave administration; f) fulfilling fiduciary obligations under my benefit plan; or (g) claim, other audits or benefit program reviews; (ii) to administrators or other service providers, including health and wellness vendors, of my employer's benefit plan(s) and/or programs, including leave management, for plan, benefit, or program related functions or data aggregation and analysis; (iii) to any electronic claim systems or programs or third party vendors used for claims administration or processing or to any insurance broker to carry out functions related to my benefit plan/program or claim; (iv) to any health care professional who has treated or evaluated me or who may do so; (v) to other persons or entities performing business, medical, or legal services related to my claim; (vi) for other insurance or reinsurance purposes, including workers' compensation insurance, Social Security Disability insurance, or subrogation or reimbursement purposes; (vii) as may be lawfully required; (viii) as may be reasonably necessary to protect the personal safety of others or myself; (ix) as may be reasonably necessary to respond to regulatory or similar complaints; and (x) as may be reasonably necessary to prevent or detect perpetration of a fraud (all entities and individuals listed herein including The Hartford defined as "Benefits Manager(s)")

I understand that My Information disclosed to Benefits Managers pertaining to certain alcohol or drug abuse treatment or HIV/AIDS or other communicable or sexually-transmitted disease is protected by federal (42 CFR Part 2) and state confidentiality rules and statutes, which prohibit any further disclosure of this information without my express written consent, or as otherwise permitted by such rules and statutes. I understand that a general authorization for the release of medical or other information is NOT sufficient for release of these types of records.

Therefore:

- ☐ **If any of my records contain information about alcohol or drug abuse, then, by checking this box, I hereby expressly allow my Benefits Managers to use or give out such information to evaluate, analyze, manage and/or administer the benefits program. I understand that the federal rules restrict any use of the information to criminally investigate or prosecute any drug or alcohol abuse patient.**
- ☐ **If any of my records contain information about HIV/AIDS or other communicable or sexually transmitted disease, then, by checking this box, I hereby expressly allow my Benefits Managers to use or give out such information to evaluate, analyze, manage and/or administer the benefits program.**

*(Continue to next page)*



I understand that once my Information is given out as allowed in this form, federal privacy laws may not protect it and it may be re-disclosed by The Hartford. I also understand that information disclosed pursuant to this Authorization may be subject to re-disclosure by the recipient. The Authorizations set forth herein expire two years from the date listed below, or upon my revocation, if earlier, but will not exceed the term of my coverage under the policy(ies) or benefit plan or program, except as may be reasonably necessary to prevent or detect perpetration of a fraud, respond to regulatory or similar complaints, or protect the personal safety of others or myself.

If I change my mind about this Authorization before that time is up, I can tell my Records Holders and The Hartford in writing that I do not want them to share any more information with other parties. If I revoke my Authorization by telling them in writing to stop sharing information with other parties, it will not change any actions they took before I revoked my permission. If I do not sign this Authorization, it will not affect how my health care providers treat me. However, if I do not sign, The Hartford may not be able to review my claim and determine whether I am eligible for benefits. This may result in denial of my request for benefits.

The Information released under this Authorization can be submitted to The Hartford electronically, by phone or fax, or by mail. I know I can see or copy the records given to The Hartford based on this Authorization. I agree that a copy of this Authorization may be treated as a signed original. I understand that I am entitled to receive a copy of this Authorization upon request. If there is a conflict between a prior request for restriction on the disclosure of My Information and this Authorization, this Authorization will control.

**NOTICE TO INFORMATION PROVIDERS:**

The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits employers and other entities covered by GINA Title II from requesting or requiring genetic information of an individual or family member of the individual, except as specifically allowed by this law. To comply with this law, we are asking that you not provide any genetic information when responding to this request for medical information. 'Genetic information' as defined by GINA, includes an individual's family medical history, the results of an individual's or family members genetic tests, the fact that an individual or an individuals' family member sought or received genetic services, and genetic information of a fetus carried by an individual or an individual's family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services. *Please note that it is appropriate under GINA to provide family medical history when an employee is requesting leave to care for a family member.*

\_\_\_\_\_  
**Claimant's Name**

\_\_\_\_\_  
**Date of Birth**

Brownsville ISD  
\_\_\_\_\_  
**Employer's Name**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Claimant's (or Legal Representative's) Signature**

\_\_\_\_\_  
**Legal Representative's Name and Relationship**

**Form must be signed in order to be considered valid.**



**SALAZAR INSURANCE GROUP**

I \_\_\_\_\_ (Employee/ Claimant name), authorize The Hartford to release information regarding my claim to the below mentioned Staff of

**Salazar Insurance Group**

**Leti Martinez (Account Executive)**

**Robert (Bob) Daniels (District Manager)**

\_\_\_\_\_

**EMPLOYEE/CLAIMANT SIGNATURE**

\_\_\_\_\_

**DATE**

-----

\_\_\_\_\_

**PRINTED NAME OF LEGAL REPRESENTATIVE / BENEFICIARY**

\_\_\_\_\_

**SIGNATURE OF LEGAL REPRESENTATIVE / BENEFICIARY**

\_\_\_\_\_

**DATE**

**HARTFORD LIFE INSURANCE COMPANY**  
**HARTFORD LIFE AND ACCIDENT INSURANCE COMPANY**



**Employer's Section - To be Completed by the Employer**

This claim is for (Employee's Name):	Social Security Number:	Date of Birth:
Employee's Address: (Street, City, State, Zip)	Telephone Number: ( )	

**A. Information About the Employer**

Company's Name: Brownsville ISD	Group Policy Number: 803820	
Address: 1900 E. Price Rd. Room 212, Brownsville, TX 78521	Telephone Number: ( 956 548 8061 )	Fax Number: ( )
Name and address of division where employee works: (if different from above)	Class:	Location:

**B. Information About the Employee**

Date employee was hired:	Date employee became insured under this plan:	What was the employee's regularly scheduled work week? _____ hours per week.
Was the employee's LTD insurance issued on the basis of a Personal Health Statement? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," attach copy.		
Was the employee insured under your prior LTD policy? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," please provide the inclusive date of coverage. From _____ Through _____ Has the employee been terminated? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," date. _____		
Reason:		
Was the employee on Qualified Family Leave when disability began? <input type="checkbox"/> Yes <input type="checkbox"/> No	Is the employee a union member? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Did LTD insurance continue while on Family Leave? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, name of union and local number:	
Date Leave of Absence started under Family Leave Act: _____		

**C. Information for Group Life Premium Waiver Benefits**

Does the employee also have Group Life Insurance coverage with The Hartford? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," provide the following information: Basic Amount \$ _____ Supplemental Amount \$ _____ Dependent Amount \$ _____
Effective Date of Group Life Insurance coverage: _____

**D. Information Needed for Withholding and Reporting Taxes**

What percent of this employee's LTD benefits is taxable? _____ %.
What percentage, if any, do you contribute towards the cost of the LTD premium? _____ %
Does the employee contribute towards the cost of the LTD premium? <input type="checkbox"/> Yes <input type="checkbox"/> No
If "Yes," is it on a <input type="checkbox"/> Pre or <input type="checkbox"/> Post Tax basis?

**E. Information About the Claim**

Were there any changes to the employee's job responsibilities due to the disabling condition before the employee became totally disabled? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," what were the changes, and when were they made?	
What was the employee's permanent job on his or her last day at work?	How long has the employee been in this job?
Why did employee stop working?	Is the employee's condition work related? <input type="checkbox"/> Yes <input type="checkbox"/> No
Last day employee actually worked:	On that day, did the employee work a full day? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," how many hours were worked? _____
Has a claim been filed with Workers' Compensation? <input type="checkbox"/> Yes <input type="checkbox"/> No	Date employee is expected/did return to work:
If "Yes," send initial report of illness or injury and award notice.	Full time? <input type="checkbox"/> Yes <input type="checkbox"/> No
Name and address of your compensation carrier	

**F. Information About Your Pension Plan (Do not complete for maternity claim.)**

Do you have a pension plan? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," what type? (Check as many as applicable)	
<input type="checkbox"/> Defined contribution <input type="checkbox"/> Profit Sharing <input type="checkbox"/> Defined benefit <input type="checkbox"/> 401 K <input type="checkbox"/> Other (specify) _____	
Is the employee eligible for your pension plan? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," why?	If eligible, does the employee participate? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," why?
If the employee is participating, when is he or she eligible for benefits under the plan?	
At what point does the employee qualify for a full pension? _____	
Is there a Disability Retirement Option available to this employee? <input type="checkbox"/> Yes <input type="checkbox"/> No	

**G. Information About Your Rehire or Return-to-Work Policies**

Does your company have a rehire or return-to-work policy for disabled employees? ☐ Yes ☐ No  
What is the name and title of the manager we should contact if we identify a rehabilitation or return-to-work option?

**H. Information About the Employee's Salary**

Basic Salary or wage immediately prior to cessation of work because of disability: (exclude bonuses, overtime, pay, etc.)

\$ \_\_\_\_\_ ☐ Annually ☐ Monthly ☐ Bi-Weekly ☐ Weekly ☐ Hourly Number of Hours/Week: \_\_\_\_\_

Is this employee eligible for salary continuation? ☐ Yes ☐ No or Sick Pay? ☐ Yes ☐ No

If "Yes," what is the bi-weekly amount? \$ \_\_\_\_\_ When do benefits begin? \_\_\_\_\_ End? \_\_\_\_\_

Will the employee file for Short Term Disability? ☐ Yes ☒ No or State Disability benefits? ☐ Yes ☒ No

If "Yes," what is the weekly amount? \$ \_\_\_\_\_ When do benefits begin? \_\_\_\_\_ End? \_\_\_\_\_

List any other sources of income to which the employee is entitled as a result of this disability:

**I. Information About the Physical Aspects of the Employee's Job**

Check the items below that relate to the employee's job and complete the information requested.  
Select either majority of workday or sporadically.

Activity	Majority of workday (with standard breaks)		Sporadically throughout day	If sporadically circle time for each section below															
				Hours at one time								Total hours/8 hour							
Sit	<input type="checkbox"/>	or	<input type="checkbox"/>	1	2	3	4	5	6	7	8	1	2	3	4	5	6	7	8
Stand	<input type="checkbox"/>	or	<input type="checkbox"/>	1	2	3	4	5	6	7	8	1	2	3	4	5	6	7	8
Walk	<input type="checkbox"/>	or	<input type="checkbox"/>	1	2	3	4	5	6	7	8	1	2	3	4	5	6	7	8

Can the job be performed alternating sitting and standing? ☐ Yes ☐ No

Activity	Never	Occasionally (1-33%)	Frequently (34-67%)	Constantly (68-100%)
Driving	<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"/>
Bending at Waist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneeling/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"/>
Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Lift/Carry/Push/Pull: Task Description (Describe object moved and any mechanical assistance in the last column)**

Lifting		lbs.	lbs.	lbs.	
Carrying		lbs.	lbs.	lbs.	
Pushing/Pulling		lbs.	lbs.	lbs.	
<b>Upper Extremity Activity (not load bearing) Specify right (R) or left (L) if not bilateral</b>					<b>Describe task performed</b>
Fine manipulation (fingering, keyboard)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Gross manipulation (grip/grasp, handle)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reach (extend arms) above shoulder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reach (extend arms) below shoulder at desk or workbench level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**J. Information About the Job as it Relates to the Disability**

Can the job 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 job? (e.g., through the use of technology or personal assistance)

☐ Yes ☐ No If "Yes," explain:

**K. Required Attachments and Signature**

- Please attach a copy of the employee's job description.
  - If the employee contributes to the premiums for LTD or Group Life Insurance coverage, attach a copy of the enrollment form and/or copies of the last two Flexible Benefits Election forms.
  - If salary is based on a W-2, K-1, 1099, or a similar document, attach a copy of the document.
  - If you have medical information from the employee's file relating to this disability, please attach copies.
  - If a Workers' Compensation claim is filed, send initial report of injury or illness and award notice.
  - Please verify if the employee qualifies for any other group benefits through The Hartford and submit the claim accordingly.
- Name of person completing this form (if this claim is approved for disability benefits, the benefit check will be sent to the employee with a copy to you).

Name (Please print or type)

Title

Signature

Date

**The patient is responsible for completion of this form without expense to the company**

06/2021





## Attending Physician's Statement – Initial

The patient is responsible for completion of this form without expense to the company

Patient Last Name: \_\_\_\_\_ Patient First (or Preferred) Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Claim Id Number: \_\_\_\_\_

**Level of Functionality** (Based upon your medical findings and opinion, address the full range of your patient's abilities.

We will conclude that there are no restrictions on function unless specified below.)

Expected duration of any restriction(s) or limitation(s) listed below THROUGH MM / DD / YYYY

In a workday the patient is able to: (select either Continuous or Intermittent)

	Continuously with standard breaks	or	Intermittently with standard breaks	If intermittent, enter time for each section below	
				Hours at one time	Total hours in a workday
Sit	<input type="checkbox"/>		<input type="checkbox"/>	__	__
Stand	<input type="checkbox"/>		<input type="checkbox"/>	__	__
Walk	<input type="checkbox"/>		<input type="checkbox"/>	__	__

**Key:** C = Continuously (5.5 – 8 hours) F = Frequently (2.5 – 5.5 hours) O = Occasionally (up to 2.5 hours) N = Never

Activity Ability	C	F	O	N	Activity Ability	Right/Left	C	F	O	N
<input type="checkbox"/> Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Squat / Kneel		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Weight bearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hand Dominance	<input type="checkbox"/> R <input type="checkbox"/> L				
<input type="checkbox"/> Climb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Fine Manipulation	<input type="checkbox"/> R <input type="checkbox"/> L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Gross Manipulation	<input type="checkbox"/> R <input type="checkbox"/> L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Max lift	__ LBS	__ LBS	__ LBS	__ LBS	<input type="checkbox"/> Reach above shoulder	<input type="checkbox"/> R <input type="checkbox"/> L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Max Carry	__ LBS	__ LBS	__ LBS	__ LBS	<input type="checkbox"/> Reach below shoulder	<input type="checkbox"/> R <input type="checkbox"/> L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Completed or Planned Diagnostic Tests, Labs and Imaging** (related to the disabling diagnosis)

Completed: ☐ X-ray \_\_/\_\_/\_\_\_\_ ☐ MRI \_\_/\_\_/\_\_\_\_ ☐ CT \_\_/\_\_/\_\_\_\_ ☐ EKG \_\_/\_\_/\_\_\_\_  
 MM DD YYYY MM DD YYYY MM DD YYYY MM DD YYYY  
☐ ECHO \_\_/\_\_/\_\_\_\_ ☐ EMG \_\_/\_\_/\_\_\_\_ ☐ Lab Work \_\_/\_\_/\_\_\_\_  
 MM DD YYYY MM DD YYYY MM DD YYYY

Findings of completed tests: ☐ No significant findings ☐ Confirmed diagnosis

Planned: ☐ X-ray ☐ MRI ☐ CT ☐ EKG ☐ ECHO ☐ EMG ☐ Lab Work Scheduled date \_\_/\_\_/\_\_\_\_  
 MM DD YYYY

### Provider Details

Provider Name: \_\_\_\_\_  
 Specialty: \_\_\_\_\_  
 EIN Number: \_\_\_\_\_  
 License Number: \_\_\_\_\_

Email: \_\_\_\_\_  
 Phone: (\_\_\_\_) \_\_\_\_-\_\_\_\_  
 Fax: (\_\_\_\_) \_\_\_\_-\_\_\_\_

Provider Signature: \_\_\_\_\_

Date: \_\_/\_\_/\_\_\_\_  
 MM DD YYYY