

**PROOF OF LOSS CLAIM STATEMENT
IMPORTANT INFORMATION REGARDING APPLICATION FOR GROUP LONG TERM
DISABILITY AND GROUP LIFE-WAIVER OF PREMIUM BENEFITS**

PLEASE READ THESE INSTRUCTIONS BEFORE COMPLETING THE ATTACHED FORMS

This is a multi-purpose form that requires completion in full by all parties concerned. This information ***must be provided two months prior to the end of the elimination period*** in order to allow sufficient processing time. Each responsible party should complete their section as soon as possible. Please fax completed claim forms and attachments (only) to 267-256-3519 or mail to Reliance Standard Life Insurance Company, P.O. Box 7749, Philadelphia, PA 19101-7749. If you have any questions, please call our Customer Service Department at 1-800-351-7500.

THE EMPLOYER IS RESPONSIBLE FOR COMPLETING THE FOLLOWING SECTIONS:

Section 1 Employer's Statement, both sides
Section 2 Occupation Analysis, both sides

THE EMPLOYEE IS RESPONSIBLE FOR COMPLETING THE FOLLOWING SECTIONS:

Section 3 Employee's Statement, both sides
Section 4 Employment and Education Information, both sides
Section 5 Sign and date the Authorization for Use in Obtaining Information

THE ATTENDING PHYSICIAN IS RESPONSIBLE FOR COMPLETING THE FOLLOWING:

Section 6 Physician's Statement



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LIFE INSURANCE COMPANY

A MEMBER OF THE TOKIO MARINE GROUP

Reset

SECTION 1
EMPLOYER'S STATEMENT
DISABILITY CLAIM
GROUP LONG TERM DISABILITY
GROUP LIFE-WAIVER OF PREMIUM

TO BE COMPLETED BY EMPLOYER

THIS CLAIM IS FOR (EMPLOYEE NAME)		SOCIAL SECURITY NUMBER		DATE OF BIRTH	
A. INFORMATION ABOUT THE EMPLOYER					
1. COMPANY'S NAME Ascension Parish School Board		PROVIDE APPLICABLE POLICY NUMBER(S): Group Policy Number VPL30464			
2. ADDRESS (STREET, CITY, STATE, ZIP)		Long Term Disability Life-Waiver of Premium			
3. NAME AND ADDRESS OF DIVISION WHERE EMPLOYEE WORKS (IF DIFFERENT FROM ABOVE)					
B. INFORMATION ABOUT THE EMPLOYEE					
1. DATE EMPLOYEE WAS HIRED? (MTH, DAY, YR)		3. DATE EMPLOYEE BECAME INSURED UNDER THIS PLAN?		LTD LIFE ____ MTH DAY YR ____ MTH DAY YR	
2. WHAT WAS THE EMPLOYEE'S REGULARLY SCHEDULED WORK WEEK? _____ hrs/wk.		UNDER YOUR PRIOR PLAN?		____ MTH DAY YR ____ MTH DAY YR	
4. PLEASE IDENTIFY THE CLASS OF THIS EMPLOYEE: (Refer to Policy Schedule of Benefits)				LTD LIFE	LIFE BENEFIT IN FORCE
5. DATE TO WHICH PREMIUM IS PAID FOR THIS EMPLOYEE				____ MTH DAY YR ____ MTH DAY YR	\$
6. THE EMPLOYEE IS (CHECK ALL THAT APPLY). PROVIDE COPY OF PAYROLL RECORD AS OF LAST DAY WORKED					
☐ HOURLY (RATE:) ☐ UNION ☐ EXEMPT ☐ FULL-TIME ☐ COMMISSIONED ☐ SALARIED ☐ NON-UNION ☐ NON-EXEMPT ☐ PART-TIME ☐ RECEIVES BONUSES					
7. IF SALARIED, BASIC MONTHLY EARNINGS AS OF LAST DAY WORKED			8. EFFECTIVE DATE OF CURRENT SALARY OR HOURLY RATE ____ MTH / ____ DAY / ____ YR		
9. WILL EMPLOYEE FILE FOR DISABILITY BENEFITS PROVIDED BY ANY EMPLOYER/EMPLOYEE LABOR MANAGEMENT, STATE DISABILITY OR UNION WELFARE PLAN? ☐ YES ☐ NO					
A. IF YES, WHAT IS THE WEEKLY AMOUNT? _____			B. WHAT TYPE OF BENEFIT? _____		
C. WHEN DO BENEFITS BEGIN? _____			END? _____		
10. IS CONDITION WORK RELATED? ☐ YES ☐ NO			11. HAS CLAIM BEEN FILED WITH WORKERS COMPENSATION? ☐ YES ☐ NO IF YES, SEND INITIAL REPORT OF ILLNESS OR INJURY AWARD NOTICE		
12. NAME AND ADDRESS OF YOUR WORKERS COMPENSATION CARRIER: (Include Policy Number)					
Contact Name:			Phone Number:		
13. NAME AND ADDRESS OF YOUR MEDICAL INSURANCE CARRIER OR ADMINISTRATOR IF SELF FUNDED: (Include Policy Number)					
Contact Name:			Phone Number:		
C. INFORMATION NEEDED FOR WITHHOLDING AND REPORTING TAXES					
PERCENTAGE OF PREMIUM PAID BY EMPLOYER: _____ % IS EMPLOYEE TAXED ON THIS AMOUNT? ☐ YES ☐ NO PERCENTAGE OF PREMIUM PAID BY EMPLOYEE: _____ % ☐ PRE-TAX DOLLARS ☐ POST-TAX DOLLARS PERCENTAGES MUST TOTAL 100%. IF LEFT BLANK WE WILL ASSUME 100% OF PREMIUM IS PAID BY EMPLOYER AND THAT EMPLOYEE IS NOT TAXED ON THIS AMOUNT. FICA TAXES WILL BE CALCULATED ACCORDINGLY					

TO BE COMPLETED BY THE EMPLOYER

DISABILITY CLAIM EMPLOYER'S STATEMENT

D. INFORMATION ABOUT THE CLAIM

1. WERE THERE ANY CHANGES TO THE EMPLOYEE'S OCCUPATIONAL RESPONSIBILITIES DUE TO THE DISABLING CONDITION BEFORE THE EMPLOYEE BECAME FULLY DISABLED? ☐ YES ☐ NO IF YES, WHAT WERE THE CHANGES AND WHEN WERE THEY MADE? (please attach)
2. WHAT WAS THE EMPLOYEE'S PERMANENT OCCUPATION ON HIS OR HER LAST DAY AT WORK? _____
3. HOW LONG HAS THE EMPLOYEE BEEN IN THIS OCCUPATION? _____
4. LAST DAY EMPLOYEE ACTUALLY WORKED (MONTH, DAY, YR.) _____ / _____ / _____
5. ON THAT DAY, DID THE EMPLOYEE WORK A FULL DAY? ☐ YES ☐ NO IF NO, HOW MANY HOURS WERE WORKED? _____
6. WHY DID EMPLOYEE STOP WORKING?
☐ LAYOFF ☐ TERMINATION FOR CAUSE ☐ FAMILY MEDICAL LEAVE ACT ☐ RESIGNATION ☐ RETIRED ☐ DISABILITY

E. INFORMATION ABOUT YOUR PENSION PLAN (DO NOT COMPLETE FOR MATERNITY CLAIM)

1. DO YOU HAVE A PENSION PLAN? ☐ YES ☐ NO
2. IF YES, WHAT TYPE?
☐ DEFINED BENEFIT ☐ 401K ☐ DEFINED CONTRIBUTION ☐ PROFIT SHARING
☐ OTHER (EXPLAIN)
3. IS THE EMPLOYEE ELIGIBLE FOR YOUR PENSION PLAN? ☐ YES ☐ NO
4. IF ELIGIBLE, DOES THE EMPLOYEE CONTRIBUTE? ☐ YES ☐ NO
5. IF YES, WHAT PERCENTAGE?
6. IF THE EMPLOYEE IS PARTICIPATING, WHEN IS HE OR SHE ELIGIBLE FOR BENEFITS UNDER THE PLAN? (Month, Day, Year) _____
7. IS THE EMPLOYEE RECEIVING ANY OTHER INCOME RELATED TO THIS DISABILITY? ☐ YES ☐ NO
SOURCE AMOUNT PER WEEK/MONTH?

F. INFORMATION ABOUT YOUR REHIRE OR RETURN-TO-WORK POLICIES

1. DOES YOUR COMPANY HAVE A REHIRE OR RETURN-TO-WORK POLICY FOR DISABLED EMPLOYEES? ☐ YES ☐ NO
2. DO YOU HAVE FULL OR PART-TIME POSITIONS AVAILABLE THAT THIS EMPLOYEE WOULD BE SUITED FOR UNDER A SUPERVISED REHABILITATION PROGRAM? ☐ YES ☐ NO
3. WHAT IS THE NAME, TITLE AND TELEPHONE NUMBER OF THE INDIVIDUAL WE SHOULD CONTACT IF WE IDENTIFY A REHABILITATION OR RETURN-TO-WORK OPTION?

G. REQUIRED ATTACHMENTS AND SIGNATURE

PROOF OF EARNINGS AS DEFINED BY APPLICABLE POLICY (EXAMPLE: PAYROLL RECORDS, W-2, K1, 1099, ETC.).
IF EMPLOYEE WAS COVERED UNDER A PRIOR PLAN, INCLUDE COPY OF PRIOR PLAN.
IF THE EMPLOYEE CONTRIBUTES TO THE PREMIUMS, ATTACH A COPY OF THE ENROLLMENT FORM.
IF YOU HAVE MEDICAL INFORMATION FROM THE EMPLOYEE'S FILE RELATING TO DISABILITY, PLEASE ATTACH COPIES.
IF A WORKERS COMPENSATION CLAIM IS FILED, SEND INITIAL REPORT OF INJURY OR ILLNESS AND AWARD NOTICE.

NAME/TITLE OF PERSON COMPLETING THIS FORM

Any person who knowingly and with intent to injure, defraud or deceive Reliance Standard Life Insurance Company, files a statement of claim or submits any information in conjunction with a claim containing fraudulent, false, misleading, incomplete or deceptive information commits a fraudulent insurance act, which is a crime. These actions will result in the denial of the claim, and are subject to prosecution under state and/or federal law. Reliance Standard Life Insurance Company will cooperate fully with any prosecution and will seek any and all appropriate legal remedies.

I CERTIFY THAT THE FACTS AS INDICATED ABOVE ARE TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.

X _____
SIGNATURE DATE

TITLE () TELEPHONE EXT.

E-MAIL ADDRESS () FAX

TO BE COMPLETED BY THE EMPLOYER

THIS CLAIM IS FOR (EMPLOYEE'S NAME)	SOCIAL SECURITY NUMBER	DATE OF DISABILITY (MONTH, DAY, YEAR)
A. GENERAL INFORMATION ABOUT THE EMPLOYEE'S OCCUPATION		
OCCUPATION TITLE	DOT CODE (DICTIONARY OF OCCUPATIONAL TITLES)	MINIMUM EDUCATION OR TRAINING REQUIRED
DOES THE EMPLOYEE PERFORM SUPERVISORY FUNCTIONS? ☐ NO ☐ YES IF YES, HOW MANY PEOPLE ARE SUPERVISED? _____		
Describe Major Tasks 1. _____		
Describe Major Tasks 2. _____		
Describe Major Tasks 3. _____		
CHECK THE ITEMS BELOW THAT RELATE TO THE EMPLOYEE'S OCCUPATION, USE THESE DEFINITIONS FOR THE FREQUENCY OF OCCURRENCE. OCCASIONALLY MEANS THE PERSON DOES THE ACTIVITY 1% TO 33% OF THE TIME FREQUENTLY MEANS THE PERSON DOES THE ACTIVITY 34% TO 66% OF THE TIME CONTINUOUSLY MEANS THE PERSON DOES THE ACTIVITY 67% TO 100% OF THE TIME		
RELATE TO OTHERS	OCCASIONALLY	FREQUENTLY
WRITTEN AND VERBAL COMMUNICATIONS	☐	☐
REASONING, MATH AND LANGUAGE	☐	☐
MAKE INDEPENDENT JUDGMENTS	☐	☐
WHICH OF THE FOLLOWING DESCRIBE THE EMPLOYEE'S WORKING ENVIRONMENT? CHECK ALL THAT APPLY.		
☐ UNPROTECTED HEIGHTS	☐ CHANGES IN TEMPERATURE OR HUMIDITY	
☐ EXPOSURE TO DUST, FUMES, AND GASES	☐ BEING NEAR MOVING MACHINERY	
☐ DRIVING AUTOMOTIVE EQUIPMENT	☐ OTHER HAZARDS	
IS THE EMPLOYEE REQUIRED TO TRAVEL? ☐ NO ☐ YES (IF YES, COMPLETE THE FOLLOWING INFORMATION)		
HOW DOES THE EMPLOYEE TRAVEL? (AUTOMOBILE, PLANE, ETC.)	WHERE DOES THE EMPLOYEE TRAVEL?	WHAT PERCENT OF THE TIME DOES THE EMPLOYEE TRAVEL?
B. INFORMATION ABOUT THE PHYSICAL ASPECTS OF THE EMPLOYEE'S OCCUPATION		
CHECK THE ITEMS BELOW THAT RELATE TO THE EMPLOYEE'S OCCUPATION AND COMPLETE THE INFORMATION REQUESTED. USE THESE DEFINITIONS FOR THE FREQUENCY OF OCCURRENCE: OCCASIONALLY MEANS THE PERSON DOES THE ACTIVITY 1% TO 33% OF THE TIME FREQUENTLY MEANS THE PERSON DOES THE ACTIVITY 34% TO 66% OF THE TIME CONTINUOUSLY MEANS THE PERSON DOES THE ACTIVITY 67% TO 100% OF THE TIME		
ACTIVITY	NEVER	OCCASIONALLY
STANDING	☐	☐
WALKING	☐	☐
SITTING	☐	☐
BALANCING	☐	☐
STOOPING	☐	☐
KNEELING	☐	☐
CROUCHING	☐	☐
CRAWLING	☐	☐
REACHING/WORKING OVERHEAD	☐	☐
CLIMBING	☐	☐
STAIRS Number of Stairs:	☐	☐
LADDER Height of Ladder	☐	☐
Describe Activity	☐	☐
PUSHING. _____ LBS.	☐	☐
PULLING. _____ LBS.	☐	☐
LIFTING/CARRYING. _____ LBS.	☐	☐
CAN THE OCCUPATION BE PERFORMED BY ALTERNATING SITTING AND STANDING? ☐ YES ☐ NO		
DOES THE OCCUPATION REQUIRE USING FEET TO OPERATE FOOT CONTROLS? ☐ YES ☐ NO IF YES, ON WHAT TYPE OF EQUIPMENT: _____		
IS GOOD VISUAL ACUITY REQUIRED IN THE OCCUPATION? ☐ YES ☐ NO		
WHAT ARE THE MAJOR TASKS REQUIRING USE OF ONE OR BOTH HANDS	ONE HAND	BOTH HANDS
_____	☐	☐
_____	☐	☐



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A MEMBER OF THE TOKIO MARINE GROUP

TO BE COMPLETED BY THE EMPLOYER

C. COMPUTER USAGE INFORMATION

IS USE OF A COMPUTER REQUIRED? ☐ NO ☐ YES (IF YES, CHECK ALL USES THAT APPLY): ☐ WORD PROCESSING ☐ SPREADSHEETS
☐ DATA-ENTRY ☐ E-MAIL ☐ OTHER (SPECIFY): _____

PERCENTAGE OF TIME SPENT WORKING ON COMPUTER _____ %

HAS ANY NECESSARY COMPUTER TRAINING BEEN PROVIDED? ☐ YES ☐ NO

D. INFORMATION ABOUT THE OCCUPATION AS IT RELATES TO THE DISABILITY

WOULD MODIFIED OR ALTERNATE EMPLOYMENT BE CONSIDERED TO ACCOMMODATE ANY WORK RELATED RESTRICTIONS (WHERE APPLICABLE AND APPROPRIATE)?

☐ YES ☐ NO IF YES, EXPLAIN

E. ATTACHMENTS AND SIGNATURE (ATTACH COPY OF THE EMPLOYEE'S OCCUPATION DESCRIPTION

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I CERTIFY THAT THE FACTS AS INDICATED ABOVE ARE TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.

X

SIGNATURE

DATE

TITLE

()
TELEPHONE

EXT.

E-MAIL ADDRESS

()
FAX



LIFE INSURANCE COMPANY

A MEMBER OF THE TOKIO MARINE GROUP

SECTION 3
EMPLOYEE'S STATEMENT
DISABILITY CLAIM
GROUP LONG TERM DISABILITY
GROUP LIFE-WAIVER OF PREMIUM

TO BE COMPLETED BY THE EMPLOYEE

A. INFORMATION ABOUT YOU

1. LAST NAME		FIRST		MIDDLE INITIAL	
2. ADDRESS		CITY		STATE/PROVINCE	
3. TELEPHONE: AREA CODE ()		4. SOCIAL SECURITY NUMBER			
5. DATE OF BIRTH (MONTH, DAY, YR)	6. HEIGHT	WEIGHT	7. ☐ MALE ☐ FEMALE	8. MARITAL STATUS	☐ SINGLE ☐ WIDOWED ☐ MARRIED ☐ DIVORCED
9. YOUR EMPLOYER (INCLUDE DIVISION IF APPLICABLE)					
10. OCCUPATION			11. DOMINANT HAND ☐ RIGHT ☐ LEFT		

B. INFORMATION ABOUT YOUR FAMILY

(REQUIRED TO DETERMINE YOUR ELIGIBILITY FOR SOCIAL SECURITY BENEFITS)

1. SPOUSE'S NAME (LAST, FIRST)		3. IS YOUR SPOUSE EMPLOYED ☐ YES ☐ NO	
2. DATE OF BIRTH (MONTH, DAY, YR)			
4. DO YOU HAVE ANY CHILDREN UNDER AGE 18? ☐ YES ☐ NO			
5. DO YOU HAVE HANDICAPPED CHILDREN (REGARDLESS OF AGE)? ☐ YES ☐ NO			
6. DO YOU HAVE ANY CHILDREN AGE 18-19, WHO ARE FULL TIME STUDENTS IN ELEMENTARY OR SECONDARY SCHOOLS? ☐ YES ☐ NO			
IF YOU ANSWERED YES TO ANY OF THE ABOVE QUESTIONS, PLEASE LIST NAMES. (LAST, FIRST)		DATE OF BIRTH	

C. INFORMATION ABOUT THE CONDITION CAUSING YOUR DISABILITY

PLEASE ANSWER THE FOLLOWING QUESTIONS:

1. WHAT WERE YOUR FIRST SYMPTOMS?	
2. WHEN DID YOU NOTICE THEM?	3. DATE YOU WERE FIRST TREATED BY A PHYSICIAN? (MONTH, DAY, YR)
4. WHY ARE YOU UNABLE TO WORK?	
5. BEFORE YOU STOPPED WORKING, DID YOUR CONDITION REQUIRE YOU TO CHANGE YOUR OCCUPATION OR THE WAY YOU DID YOUR OCCUPATION? ☐ YES ☐ NO	
6. HAVE YOU FILED, OR DO YOU INTEND TO FILE A WORKERS COMPENSATION CLAIM? ☐ YES ☐ NO	
FOR AN INJURY, ANSWER THE FOLLOWING QUESTIONS:	
7. WHERE AND HOW DID THE INJURY OCCUR?	
8. DATE THE INJURY OCCURRED (MONTH, DAY, YR)	9. DATE YOU WERE FIRST TREATED FOR THIS INJURY BY A PHYSICIAN (MONTH, DAY, YR)

D. INFORMATION ABOUT THE DISABILITY

1. DATE YOU WERE FIRST UNABLE TO WORK ON A FULL TIME BASIS (MONTH, DAY, YR)	
2. LAST DAY YOU WORKED BEFORE THE DISABILITY (MONTH, DAY, YR)	
3. DID YOU WORK A FULL DAY? ☐ YES ☐ NO IF NO, EXPLAIN.	
4. HAVE YOU RETURNED TO WORK? ☐ YES ☐ NO PART TIME (DATE) FULL TIME (DATE)	
5. IF YOU HAVE NOT RETURNED TO WORK, DO YOU EXPECT TO? ☐ YES ☐ NO	
PART TIME DATE	FULL TIME DATE

DISABILITY CLAIM EMPLOYEE'S STATEMENT

TO BE COMPLETED BY THE EMPLOYEE

E. INFORMATION ABOUT PHYSICIANS AND HOSPITALS

DATE YOU WERE FIRST TREATED FOR THE CURRENT ILLNESS OR INJURY:

LIST ALL MEDICAL PRACTITIONERS CONSULTED FOR THIS CONDITION:

DOCTOR'S NAME	TELEPHONE ()	SPECIALTY:
	FAX ()	

ADDRESS (STREET, CITY, STATE, ZIP)	DATES SEEN
------------------------------------	------------

DOCTOR'S NAME	TELEPHONE ()	SPECIALTY:
	FAX ()	

ADDRESS (STREET, CITY,	DATES SEEN
------------------------	------------

PLEASE ATTACH ADDITIONAL INFORMATION ON SEPARATE SHEET IF MORE DOCTORS WERE CONSULTED

HOSPITAL

ADDRESS (STREET, CITY, STATE, ZIP)	DATES OF CONFINEMENT
	FROM _____ TO _____

F. INFORMATION ABOUT OTHER DISABILITY INCOME

CHECK THE OTHER INCOME BENEFITS YOU ARE RECEIVING OR ARE ELIGIBLE TO RECEIVE AS A RESULT OF YOUR DISABILITY AND COMPLETE THE INFORMATION REQUESTED

SOURCE OF INCOME	AMOUNT (WK. MONTH)	DATE CLAIM WAS FILED	DATE PAYMENTS BEGAN	DATE PAYMENTS ENDED
SALARY CONTINUANCE	\$ _____ / _____	_____	_____	_____
SHORT TERM DISABILITY	\$ _____ / _____	_____	_____	_____
STATE DISABILITY	\$ _____ / _____	_____	_____	_____
WORKERS COMPENSATION	\$ _____ / _____	_____	_____	_____
SOCIAL SECURITY/RETIREMENT	\$ _____ / _____	_____	_____	_____
SOCIAL SECURITY/DISABILITY	\$ _____ / _____	_____	_____	_____
SOCIAL SECURITY FOR DEPENDENTS	\$ _____ / _____	_____	_____	_____
CANADIAN PENSION PLAN	\$ _____ / _____	_____	_____	_____
PENSION/RETIREMENT	\$ _____ / _____	_____	_____	_____
PENSION/DISABILITY	\$ _____ / _____	_____	_____	_____
UNEMPLOYMENT	\$ _____ / _____	_____	_____	_____
NO-FAULT INSURANCE	\$ _____ / _____	_____	_____	_____
JONES ACT	\$ _____ / _____	_____	_____	_____
RAILROAD RETIREMENT	\$ _____ / _____	_____	_____	_____
OTHER (INCLUDE INDIVIDUAL OR GROUP)	\$ _____ / _____	_____	_____	_____

G. INFORMATION ABOUT INCOME TAX WITHHOLDING

We are required to withhold federal income tax from any benefit payments upon your request. If benefits are taxable by your state, we will also withhold state income tax upon your request. We may also send a report to your employer at the end of each calendar year showing your name, social security number, any benefits paid and any taxes withheld. If you would like us to withhold any taxes, please indicate the dollar amount to be withheld each week:

Federal Tax to be Withheld _____ (\$88.00 Minimum per month, whole dollars only)

State Tax to be Withheld _____ (\$10.00 Minimum per month, whole dollars only)

H. SIGNATURE (REQUIRED FOR ALL CLAIMS)

Any person who knowingly and with intent to injure, defraud or deceive Reliance Standard Life Insurance Company, files a statement of claim or submits any information in conjunction with a claim containing fraudulent, false, misleading, incomplete or deceptive information commits a fraudulent insurance act, which is a crime. These actions will result in the denial of the claim, and are subject to prosecution under state and/or federal law. Reliance Standard Life Insurance Company will cooperate fully with any prosecution and will seek any and all appropriate legal remedies.

I CERTIFY THAT THE FACTS AS INDICATED ABOVE ARE TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.

SIGNATURE _____	DATE _____	E-MAIL ADDRESS _____
-----------------	------------	----------------------

H. INFORMATION ABOUT ELECTRONIC DEPOSIT

I authorize RSL to send my disability payments to the Bank designated below for electronic deposit in my Account. I understand that I may terminate this arrangement at any time by writing to the RSL address above.

☐ Yes Set-up Direct Deposit

Bank/Financial Institution Information

Name of Bank (Print)

Address of Bank

City,

State

Zip

Choose Type of Account

☐ Checking ☐ Savings

Bank Transit/Routing Number (9 Digits)

Personal Account Number

Or Attach a Voided Check imprinted with your name.

I. SIGNATURE (REQUIRED FOR ALL CLAIMS)

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I CERTIFY THAT THE FACTS AS INDICATED ABOVE ARE TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.

SIGNATURE

DATE

E-MAIL ADDRESS

TO BE COMPLETED BY THE EMPLOYEE

EMPLOYMENT AND EDUCATION INFORMATION	
PLEASE PRINT ALL INFORMATION	
1. CLAIMANT'S NAME:	
2. POLICY NUMBER: VPL30464	
3. SOCIAL SECURITY NUMBER:	
PLEASE COMPLETE THE FOLLOWING INFORMATION AS ACCURATELY AS POSSIBLE. THIS DATA IS NEEDED TO HELP MAKE A THOROUGH EVALUATION OF YOUR CLAIM.	
EDUCATION/TRAINING	
HIGH SCHOOL:	
1. COURSE OF STUDY:	
2. HIGHEST GRADE COMPLETED:	
3. DID YOU OBTAIN YOUR GED IF YOU DID NOT GRADUATE FROM HIGH SCHOOL? ☐ YES ☐ NO	
IF YES, WHEN? _____	
IF NO, DO YOU PLAN TO OBTAIN YOUR GED IN THE FUTURE?: ☐ YES ☐ NO	
COLLEGE:	
1. DID YOU ATTEND COLLEGE? ☐ YES ☐ NO	
2. WHERE?	
3. COURSE OF STUDY:	
4. DEGREE? ☐ YES ☐ NO	5. NUMBER OF YEARS COMPLETED:
6. TYPE OF DEGREE:	WHEN?
VOCATIONAL TRAINING:	
1. WHERE?	
2. WHAT TYPE?	
3. CERTIFICATE OR LICENSE OBTAINED?	
4. WHAT SPECIALIZED TRAINING HAVE YOU HAD INCLUDING EQUIPMENT/MACHINERY USED?	

5. DO YOU HAVE KNOWLEDGE OR PROFICIENCY WITH PERSONAL COMPUTERS? ☐ YES ☐ NO	
6. IF YES, PLEASE LIST SOFTWARE PROGRAMS YOU HAVE USED:	

TO BE COMPLETED BY THE EMPLOYEE

EMPLOYMENT HISTORY			
STARTING WITH PRESENT EMPLOYER, PLEASE LIST AND DESCRIBE ALL OCCUPATIONS YOU HAVE HELD IN THE PAST 15 YEARS. IF MORE THAN 1 OCCUPATION WITH ANY EMPLOYER, PLEASE LIST EACH. ATTACH RESUME OR ADDITIONAL PAPER AS NECESSARY.			
1. NAME OF EMPLOYER:			
2. START DATE:	3. END DATE:	4. OCCUPATION TITLE:	5. MONTHLY SALARY:
6. REASON FOR LEAVING:			
7. DETAIL YOUR DUTIES: _____ _____ _____			
8. WHAT WERE THE PHYSICAL/MENTAL REQUIREMENTS?			
9. DID YOU USE A COMPUTER? ☐ NO ☐ YES (IF YES, CHECK ALL USES THAT APPLY): ☐ WORD PROCESSING ☐ SPREADSHEETS ☐ DATA-ENTRY ☐ E-MAIL ☐ OTHER (SPECIFY):			
10. NAME OF EMPLOYER:			
11. START DATE:	12. END DATE:	13. OCCUPATION TITLE:	14. MONTHLY SALARY:
15. REASON FOR LEAVING:			
16. DETAIL YOUR DUTIES: _____ _____ _____			
17. WHAT WERE THE PHYSICAL/MENTAL REQUIREMENTS?			
18. DID YOU USE A COMPUTER? ☐ NO ☐ YES (IF YES, CHECK ALL USES THAT APPLY): ☐ WORD PROCESSING ☐ SPREADSHEETS ☐ DATA-ENTRY ☐ E-MAIL ☐ OTHER (SPECIFY):			
19. NAME OF EMPLOYER:			
20. START DATE:	21. END DATE:	22. OCCUPATION TITLE:	23. MONTHLY SALARY:
24. REASON FOR LEAVING:			
25. DETAIL YOUR DUTIES: _____ _____ _____			
26. WHAT WERE THE PHYSICAL/MENTAL REQUIREMENTS?			
27. DID YOU USE A COMPUTER? ☐ NO ☐ YES (IF YES, CHECK ALL USES THAT APPLY): ☐ WORD PROCESSING ☐ SPREADSHEETS ☐ DATA-ENTRY ☐ E-MAIL ☐ OTHER (SPECIFY):			
28. PROJECTED RETURN TO WORK DATE?		29. HAVE YOU CONTACTED YOUR FORMER EMPLOYER? ☐ YES ☐ NO	
30. HAVE YOU BEEN LOOKING FOR EMPLOYMENT? ☐ YES ☐ NO			
31. ARE YOU FAMILIAR WITH YOUR LTD POLICY'S RETURN TO WORK INCENTIVES AND REHABILITATION SERVICES? ☐ YES ☐ NO			
32. DO YOU USE A COMPUTER AT HOME? ☐ YES ☐ NO		33. DO YOU HAVE INTERNET ACCESS? ☐ YES ☐ NO	

AUTHORIZATION FOR USE IN OBTAINING INFORMATION

NAME OF INSURED: _____

INSURED'S DATE OF BIRTH: _____

POLICYHOLDER: Ascension Parish School Board

To all physicians and other health care professionals, hospitals, other health care institutions, insurers, medical, hospital and prepaid health plans, pharmacies, pharmacy benefit managers, employers, group policyholders, contract holders, governmental agencies (including but not limited to the Internal Revenue Service and the Social Security Administration), private and/or public benefit plan administrators, and/or attorney representatives, including but not limited to covered entities and business associates under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and the accompanying regulations:

You are authorized to provide Reliance Standard Life Insurance Company and/or its authorized administrators, including but not limited to Matrix Absence Management, with my complete medical records including, including but not limited to all information concerning medical care, advice, and/or treatment provided to me, the above named Insured, and/or any employment, salary, tax and/or benefit-related information concerning me, the above named Insured. This medical or health information may include information on the diagnosis and treatment of mental illness, alcohol, and drug use. This also may include information on the diagnosis, treatment, and testing results related to HIV, AIDS, and sexually transmitted diseases, unless otherwise restricted by state law. I also understand that information used or disclosed pursuant to this authorization may be subject to redisclosure by the recipient and will no longer be subject to protection under HIPAA and the accompanying regulations. A statement of Reliance Standard Life Insurance Company's privacy policy is available at www.rsli.com or upon request.

Reliance Standard Life Insurance Company will not condition the provision of treatment, payment, enrollment in a health plan, or eligibility for benefits on the provision of this Authorization, except that this Authorization may be required to allow a covered entity to disclose protected health information where such disclosure is necessary to evaluate my claim for benefits.

I understand that any such information will be used for the purpose of evaluating my claim for benefits. Upon request, I understand that I am entitled to receive a copy of this Authorization. This Authorization is valid from the date signed for the duration of the claim, and may be revoked by me at any time upon written request to the address above. A reproduction of this Authorization shall be considered as valid as the original.

Date: _____ Insured's Signature: _____
(If the Insured is unable to sign, an authorized person may sign.)

Date: _____ Authorized Person's Signature: _____
Description of Authorized Person's authority to sign on behalf of Insured: _____

This form should be completed by the physician who was treating the claimant when he or she last worked.

TO BE COMPLETED BY THE ATTENDING PHYSICIAN

A. GENERAL INFORMATION				
This claim is for (Patient's Name)				Policy Number VPL30464
Date of Birth (Month, Day, Year)	Height (Ft., Inches)	Weight (Lbs.)	Blood Pressure	Patient's Social Security Number
Primary Diagnosis including ICD9 or ICD-10 code				
B. PREGNANCY: PHYSICIAN COMPLETES THIS SECTION FOR NORMAL PREGNANCY				
1. DATE OF LAST MENSTRUAL PERIOD	2. EXPECTED DATE OF DELIVERY	3. TYPE OF DELIVERY EXPECTED	4. DATE OF DELIVERY	
5. INITIAL VISIT FOR THIS PREGNANCY	6. LAST DATE OF TREATMENT	7. EXPECTED LENGTH OF POSTPARTUM RECOVERY		
C. PHYSICIAN COMPLETES THIS SECTION FOR ALL CONDITIONS EXCEPT NORMAL PREGNANCY				
1. PRIMARY DIAGNOSIS (INCLUDING ICD-9 or ICD-10 CODE):				
2. SYMPTOMS (subjective)				
3. OBJECTIVE FINDINGS: (PLEASE PROVIDE COPIES OF TEST RESULTS AND OFFICE NOTES)				
4. ARE THERE ANY SECONDARY CONDITIONS CONTRIBUTING TO DISABILITY? IF YES, WHAT ARE THEY? (INCLUDING ICD-9 OR ICD-10 DSMIII R CODE):				
5. WHEN DID SYMPTOMS FIRST APPEAR ____/____/____ MTH DAY YR	6. DATE OF PATIENT'S FIRST VISIT ____/____/____ MTH DAY YR	7. DATE OF PATIENT'S LAST VISIT ____/____/____ MTH DAY YR	8. FREQUENCY OF VISITS	
9. WAS THE PATIENT REFERRED BY ANOTHER MEDICAL PRACTITIONER?		10. IF SO, FURNISH THE NAME AND ADDRESS.		
11. IS THE PATIENT'S CONDITION WORK RELATED? ☐ YES ☐ NO IF YES, EXPLAIN:				
12. HAS THE PATIENT UNDERGONE A SURGICAL PROCEDURE? ☐ YES ☐ NO IF NO, SKIP TO 13.				
12a. PROCEDURE:	12b. DATE:	12c. FACILITY (NAME/ADDRESS)		
13. DO YOU EXPECT SURGERY IN THE NEAR FUTURE? ☐ YES ☐ NO IF NO, SKIP TO 14.				
13a. PROCEDURE:	13b. DATE:	13c. FACILITY (NAME/ADDRESS)		
14. WHAT PRESCRIBED MEDICATION IS THE PATIENT CURRENTLY TAKING AND WHAT DOSAGE?				
15. HAVE YOU REFERRED THE PATIENT FOR OTHER TYPES OF CONSULTATIONS? ☐ YES ☐ NO IF YES, EXPLAIN.				
16. HAVE YOU REFERRED THE PATIENT TO A MEDICAL REHABILITATION OR THERAPY PROGRAM? IF YES, PLEASE IDENTIFY:				
D. PHYSICIAN COMPLETES FOR ANY HOSPITAL CONFINEMENTS				
1. NAME AND ADDRESS OF HOSPITAL:		2. DATE(S) CONFINED FROM/TO IN THE PRIOR 2 YEARS.		

TO BE COMPLETED BY THE ATTENDING PHYSICIAN

E. DESCRIPTION OF PATIENT'S RESTRICTIONS AND LIMITATIONS					
1. Over the course of an 8 hour day, with 2 breaks and lunch, the patient can alternately:	stand	☐ None	☐ 1-3 Hours	☐ 3-5 Hours	☐ 5-8 Hours
	sit:	☐ None	☐ 1-3 Hours	☐ 3-5 Hours	☐ 5-8 Hours
	walk:	☐ None	☐ 1-3 Hours	☐ 3-5 Hours	☐ 5-8 Hours
	drive:	☐ None	☐ 1-3 Hours	☐ 3-5 Hours	☐ 5-8 Hours
2. Patient can use upper extremities for repetitive:	A. Simple Grasping	Right ☐ Yes ☐ No Left ☐ Yes ☐ No	B. Pushing/Pulling	Right ☐ Yes ☐ No Left ☐ Yes ☐ No	C. Fine Manipulation
					Right ☐ Yes ☐ No Left ☐ Yes ☐ No
3. Patient is able to:	CONTINUOUS 67-100%	FREQUENT 34-66%	OCCASIONAL 0-33%	NO RESTRICTIONS	
Bend (at waist)	☐	☐	☐	☐	
Squat (at waist)	☐	☐	☐	☐	
Climb	☐	☐	☐	☐	
Reach above Shoulder	☐	☐	☐	☐	
Kneel	☐	☐	☐	☐	
Crawl	☐	☐	☐	☐	
Use Feet (foot controls)	☐	☐	☐	☐	
Drive	☐	☐	☐	☐	
4. In an 8 hour day patient can lift/carry:					
☐ 10 lbs. maximum and occasionally carry small objects:		SEDENTARY WORK			
☐ 20 lbs. maximum and frequently lift/carry up to 10 lbs.:		LIGHT WORK			
☐ 50 lbs. maximum and frequently lift/carry up to 25 lbs.:		MEDIUM WORK			
☐ 100 lbs. maximum and frequently lift/carry up to 50 lbs.:		HEAVY WORK			
☐ In excess of 100 lbs. and frequently lift/carry 50 lbs.:		VERY HEAVY WORK			
F. PHYSICIAN COMPLETES IF LIMITATIONS ARE MENTAL/NERVOUS IN NATURE					
TO WHAT DEGREE, IF ANY, ARE THE FOLLOWING CAPACITIES AFFECTED?					
CAPACITY	NOT LIMITED	MODERATELY LIMITED	EXTREMELY LIMITED		
Ability to relate to other people beyond giving and receiving instructions	☐	☐	☐		
Ability to complete and follow instructions	☐	☐	☐		
Ability to perform simple and repetitive tasks	☐	☐	☐		
Ability to perform complex and varied tasks	☐	☐	☐		
In your opinion, does the claimant possess the mental capacity to understand his/her financial affairs and to direct the use of his/her funds? ☐ Yes ☐ No					
G. PHYSICIAN COMPLETES ONLY IF THE CONDITION IS CARDIAC IN NATURE					
Functional Capacity	☐ Class 1 (no limitation)		☐ Class 2 (slight limitation)		
(American Heart Association)	☐ Class 3 (marked limitation)		☐ Class 4 (complete limitation)		
H. PHYSICIAN COMPLETES FOR ALL CONDITIONS: PROGNOSIS FOR RECOVERY					
1. HAS THE PATIENT ACHIEVED MAXIMUM MEDICAL IMPROVEMENT? ☐ Yes ☐ No					
2. IF YES, AS OF WHAT DATE CAN PATIENT RETURN TO WORK? _____ / _____ / _____ MTH DAY YR					
3. IF NO, WHEN DO YOU EXPECT PATIENT WILL ACHIEVE MAXIMUM MEDICAL IMPROVEMENT?					
☐ <2 weeks	☐ <4 weeks	☐ <2 months	☐ 3-4 months		
☐ 5-6 months	☐ 6-8 months	☐ <12 months	☐ <16 months		
4. WHEN THE ABOVE CHANGE OCCURS, WHAT FUNCTIONAL CAPACITY WILL THE PATIENT RECEIVE?					
☐ FULL RECOVERY ☐ IMPROVED OVER CURRENT BUT NOT FULL ☐ REMAIN AT PRESENT					
Any person who knowingly and with intent to injure, defraud or deceive Reliance Standard Life Insurance Company, files a statement of claim or submits any information in conjunction with a claim containing fraudulent, false, misleading, incomplete or deceptive information commits a fraudulent insurance act, which is a crime. These actions will result in the denial of the claim, and are subject to prosecution under state and/or federal law. Reliance Standard Life Insurance Company will cooperate fully with any prosecution and will seek any and all appropriate legal remedies.					
Your Name (Please Print)			Degree		
Specialty		Telephone: () Fax: ()			
Address (Please Print)					
Physician's Signature (no stamp)				Date	

IMPORTANT: PLEASE ATTACH ALL MEDICAL RECORDS FROM THREE (3) MONTHS PRIOR TO DATE OF DISABILITY TO PRESENT.

IMPORTANT INFORMATION REGARDING APPLICATION FOR BENEFITS

ALABAMA, ARKANSAS and LOUISIANA — 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 to appear on this form. Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the 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.

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.

KENTUCKY — Any person who knowingly and with intent to defraud any insurance company or other person files 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.

MAINE — 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 a denial of insurance benefits.

MARYLAND — Any person who knowingly or willfully presents a false or fraudulent claim for payment of a loss or benefit or 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.

NEW JERSEY — Any person who includes any false or misleading information on an application for an insurance policy is subject to criminal and civil penalties.

NEW MEXICO — 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 civil fines and criminal penalties.

NEW YORK (health insurance only) — 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.

OHIO — Any person who, with 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 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.

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 with the penalty of 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.

RHODE ISLAND — 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.

TENNESSEE, 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 include imprisonment, fines and denial of insurance benefits.

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.

WASHINGTON, DC — 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.