

# Disability Claim Filing Instructions

**NOTE: This packet must be returned to the GPISD Benefits office to be filed, no fax will be accepted.**

1. Complete the Employee's Statement in full.
2. Have the physician treating you complete the Attending Physician's Statement, and Return it to you. **NO FAX ACCEPTED (Physician should not forward this form to anyone but you.)**
3. Verify all documents have been signed including the Authorization for Release of Information form.
4. Employer's statement will be completed by the Benefits office once all forms have been returned. The Benefits Office is located in the Administration Bldg at:

**14705 Woodforest Blvd.  
Houston, TX 77015**

**All portions of these forms must be completed  
in order to expedite your claim.**

For questions please contact the Benefits Office at 832-386-1245.



**FOR PREGNANCY DISABILITY ONLY:**

Are there any present complications or anticipated difficulties in connection with the following?

- (a) Pregnancy  YES  NO Date of last menstrual period: \_\_\_\_\_ Expected date of delivery \_\_\_\_\_  
 (b) Delivery  YES  NO Actual date of delivery: \_\_\_\_\_  Vaginal  C-Section  
 (c) Post Partum  YES  NO

If "YES" to any of these, please specify in detail: \_\_\_\_\_  
 \_\_\_\_\_

As a result of this disability, are you, your spouse or any of your dependent children receiving income from any of the following?

YES	NO	TYPE	AMOUNT	DATE BEGAN	DATE TERM.	PAID WEEKLY	PAID MONTHLY
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sick Pay	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Salary Continuance	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Workers' Compensation	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Local, State or National Association or Society Disability Income Plan	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	No Fault	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unemployment Compensation disability	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Social Security Benefits (disability or retirement)	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Retirement income (normal, early, or disability)	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other STD/LTD Benefits	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other (describe) _____	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>

HAVE YOU APPLIED, OR DO YOU PLAN TO APPLY FOR BENEFITS DESCRIBED ABOVE?  YES  NO  
 TYPE \_\_\_\_\_ DATE APPLICATION FILED \_\_\_\_\_  
 TYPE \_\_\_\_\_ DATE APPLICATION FILED \_\_\_\_\_

IF YOUR REQUEST FOR BENEFITS IS APPROVED, DO YOU WANT US TO WITHHOLD FEDERAL INCOME TAXES?  
 YES  NO INDICATE AMOUNT: \$ \_\_\_\_\_ (\$88 MINIMUM PER MONTH)

TO THE BEST OF MY KNOWLEDGE AND BELIEF, ALL STATEMENTS MADE ON THIS APPLICATION ARE TRUE AND COMPLETE. IF MY ANSWERS ON THIS CLAIM FORM ARE INCORRECT OR UNTRUE, OF IF I REFUSE TO SIGN THE AUTHORIZATION FOR RELEASE OF INFORMATION, FORTIS BENEFITS INSURANCE COMPANY HAS THE RIGHT TO DENY MY CLAIM.

Signature of Employee \_\_\_\_\_

Date \_\_\_\_\_

**FRAUD NOTICES**

Unless specific state language is provided below, the following general fraud notice applies: 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.

**AR & LA Residents:** Any person who knowingly presents a false or fraudulent claim for payment of 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.

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

**CO Residents:** 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 policy holder or claim for purpose of defrauding or attempting to defraud the policy holder or claimant with regard to a settlement or award payable from insurance proceeds shall be reported to the Colorado Div. of Ins. within the Department of Regulatory Agencies.

**DC Residents:** 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.

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

**KS, MD, OR & VA Residents:** 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 may be guilty of insurance fraud.

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

**NY Residents:** 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 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.

**PLEASE COMPLETE BOTH SIDES OF THIS FORM**  
**AUTHORIZATION FOR RELEASE OF INFORMATION (excluding psychotherapy notes)**  
**(to be signed and dated by the insured/claimant)**

I authorize any licensed physician, any other medical practitioner or provider, pharmacist, hospital, clinic, other medical or medically related facility, federal, state or local government agency, insurance or reinsuring company, consumer reporting agency or employer having information available as to diagnosis, treatment and prognosis with respect to any physical or mental condition and/or treatment of me, and any non-medical information about me, to give any and all such information to authorized representatives of Disability Reinsurance Management Services, Inc. (Disability RMS), and Fortis Benefits Insurance Company *excluding psychotherapy notes*, and including, but not limited to, any other mental or psychiatric records, medical, dental and hospital records (including psychiatric, alcohol, and drug abuse, and HIV/AIDS information) which may have been acquired in the course of examination or treatment. I understand that the information obtained by use of this authorization will be used by Disability RMS, Fortis Benefits Insurance Company and the above-described representatives to evaluate and adjudicate my current disability claim, and may be re-disclosed to (a) any medical, investigative, financial or vocational specialist or entity, or (b) any other organization or person, employed by or representing Disability RMS or Fortis Benefits Insurance Company solely to assist with the evaluation and adjudication of my current disability claim. Each such person or entity to whom this re-disclosure is made shall comply with the HIPAA Privacy Rule as regards any re-disclosed protected health information.

This authorization is valid during the pendency of my claim and shall expire on the date my claim finally ends. A photocopy of this authorization is as valid as the original. I understand that my authorized representative or I have the right to request and receive a copy of this authorization and the information to which it pertains.

I understand that I have the right to revoke this authorization by notifying Disability RMS in writing, of my revocation. However, such revocation is not effective to the extent that Disability RMS and/or Fortis Benefits Insurance Company have relied previously upon this authorization for the use or disclosure of my protected health information. In addition, I understand that my revocation of, or my failure to sign this authorization may impair Disability RMS' and Fortis Benefits Insurance Company's ability to evaluate my current disability claim and as a result may be a basis for denying that current disability claim for benefits.

- If you reside in California, Connecticut or North Dakota: This authorization excludes the release of information about Human Immunodeficiency Virus (HIV).

- If you reside in Minnesota or Wisconsin: This authorization excludes the release of information about HIV (AIDS VIRUS) tests.

- If you reside in Maine: This authorization excludes disclosure of the result of a test for HIV if the applicant has tested positive but has not developed symptoms of the disease AIDS. Such test results shall not be discovered or published. Nothing in this caveat will prohibit this authorization from including the fact that the applicant has AIDS.

- If you reside in Vermont: This authorization EXCLUDES the release of any information about previously administered HIV-related tests, including but not limited to tests for HIV antibodies, T-Cell counts, AIDS or ARC. The proposed insured is NOT AUTHORIZING DRMS to forward the results from any new test, requested by us, to any outside, non-affiliated company or entity not under specific contract with us to perform underwriting services, and DRMS shall comply, as applicable with the provisions of Title 8, Section 4724 (20) of the Vermont Statutes.

Claimant Signature (or Authorized Representative) \_\_\_\_\_ Date: \_\_\_\_\_

Description of Personal Representative's Authority (If applicable): \_\_\_\_\_

\*If signed by authorized representative, attach verification of identity

**Disability RMS  
NOTICE OF CLAIM FOR LONG/SHORT TERM DISABILITY BENEFITS**

**EMPLOYER'S OR ADMINISTRATOR'S STATEMENT (ALL QUESTIONS MUST BE ANSWERED TO AVOID DELAY)**

NAME OF EMPLOYEE			OCCUPATION		IS DISABILITY DUE TO EMPLOYMENT? <input type="checkbox"/> YES <input type="checkbox"/> NO		
DATE EMPLOYED / /	DATE INSURED / /	DATE LAST WORKED / /	REASON FOR STOPPING WORK <input type="checkbox"/> Resigned? <input type="checkbox"/> Layoff <input type="checkbox"/> Family Medical Leave of Absence <input type="checkbox"/> Other Reason _____		<input type="checkbox"/> Disability <input type="checkbox"/> Dismissed <input type="checkbox"/> Retired <input type="checkbox"/> Other Leave of Absence		
DATE RETURNED TO WORK / / <input type="checkbox"/> FULL-TIME <input type="checkbox"/> PART-TIME	IF PART-TIME, NUMBER OF HOURS WORKED PER WEEK	IF EMPLOYEE HAS NOT RETURNED TO WORK, ESTIMATED RETURN TO WORK DATE: / /	DATE EMPLOYMENT TERMINATED / /	DATE DISABILITY INSURANCE TERMINATED / /			
REQUIRED NUMBER OF HRS. PER WEEK _____ hrs.	GROSS ANNUAL SALARY: (During the 12 months just prior to your employee's disability) \$ _____		PLEASE INDICATE HOW THE EMPLOYEE IS PAID: <input type="checkbox"/> 9 MOS./YR. <input type="checkbox"/> 10 MOS./YR. <input type="checkbox"/> 12 MOS./YR. <input type="checkbox"/> OTHER _____				
IS EMPLOYEE SUBJECT TO FICA TAX? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO IF "YES", IS EMPLOYEE SUBJECT TO <input type="checkbox"/> FULL FICA TAX ? <input checked="" type="checkbox"/> MEDICARE PORTION ONLY?							
PERCENTAGE OF EMPLOYEE/EMPLOYER CONTRIBUTION TO PREMIUM FOR THIS DISABILITY PLAN (AS OF POLICY YEAR OF DISABILITY) EMPLOYEE <input checked="" type="checkbox"/> 100% <input type="checkbox"/> OTHER _____% IS EMPLOYEE CONTRIBUTION: <input type="checkbox"/> PRE-TAX DEDUCTION? EMPLOYER <input type="checkbox"/> 100% <input type="checkbox"/> OTHER _____% <input checked="" type="checkbox"/> AFTER-TAX DEDUCTION?							
EMPLOYEE ELIGIBLE FOR:							
YES	NO	TYPE	AMOUNT	DATE BEGAN	DATE TERM.	PAID WEEKLY	PAID MONTHLY
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sick Pay	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Salary Continuance Benefits	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Workers' Compensation	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Local, State or National Association or Society Disability Income Plan	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	No-fault	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unemployment Compensation disability	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Social Security Benefits (disability or retirement)	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Retirement income (normal, early, or disability)	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other LTD/STD Benefits	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other (describe) _____	\$ _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
PLEASE ATTACH A COPY OF THE FOLLOWING DOCUMENTS TO THIS FORM:							
➤ The employee's Workers' Compensation claim(s) and Approval/Denial Notification							
➤ The employee's prior year's W-2 form OR if no W-2 is available, list the basic monthly earnings for the past 12 months just prior to the employee's date of disability							
➤ The employee's current job description							
I CERTIFY THAT TO THE BEST OF MY KNOWLEDGE THE ABOVE STATEMENTS ARE TRUE AND CORRECT.							
_____ NAME OF POLICYHOLDER (COMPANY)			_____ PRINT NAME & TITLE OF OFFICIAL REPRESENTATIVE				
_____ MAILING ADDRESS OF POLICYHOLDER (COMPANY) ( ) -			_____ SIGNATURE		_____ DATE		
_____ TELEPHONE NUMBER			_____ FAX NUMBER				

# Disability RMS

## ATTENDING PHYSICIAN'S STATEMENT - THIS STATEMENT MUST BE FILLED-IN COMPLETELY BY A PHYSICIAN (Please Print or Type)

Name of Patient  _____		<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of Birth  / /
<i>FIRST</i>	<i>MIDDLE</i>	<i>LAST</i>	
Height	Weight	Blood Pressure (last visit) Systolic / Diastolic	<input type="checkbox"/> Left-handed <input type="checkbox"/> Right-handed

### 1. HISTORY:

- a. Is condition due to  Accident?  Sickness?
- b. When did symptoms first appear or injury occur? Mo. \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_
- c. Date patient was unable to work because of impairment Mo. \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_
- d. Has patient ever had same or similar condition?  Yes  No If "Yes", state when and describe  
\_\_\_\_\_
- e. Is condition due to injury or sickness arising out of patient's employment?  Yes  No Please explain: \_\_\_\_\_
- f. Was this patient referred to you?  Yes  No If "Yes", by whom and what is their specialty?  
\_\_\_\_\_
- g. Have you referred this patient to another treating provider?  Yes  No If "Yes", to whom and what is their specialty?  
\_\_\_\_\_

### 2. DIAGNOSIS:

- a. Diagnosis impacting function: \_\_\_\_\_ ICD9 Code(s) \_\_\_\_\_  
Nature of treatment (including surgery and medications prescribed, if any, including dosage and frequency) \_\_\_\_\_
- b. Secondary diagnosis impacting function: \_\_\_\_\_  
Nature of treatment (including surgery and medications prescribed, if any, including dosage and frequency) \_\_\_\_\_
- c. Subjective symptoms: \_\_\_\_\_
- d. Objective findings (including current X-rays, EKGs, Laboratory Data and any clinical findings): \_\_\_\_\_

### 3. FOR PREGNANCY DISABILITY ONLY:

- Are there any present complications or anticipated difficulties in connection with:
- (a) Pregnancy  YES  NO Date of last menstrual period: \_\_\_\_\_ Expected date of delivery: \_\_\_\_\_
  - (b) Delivery  YES  NO Actual date of delivery: \_\_\_\_\_  Vaginal  C-Section
  - (c) Post Partum  YES  NO
- If "YES" to any of these, please specify in detail: \_\_\_\_\_

### 4. DATES OF TREATMENT FOR THIS CONDITION:

- a. Date of first visit Mo. \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_
- b. Date of last visit Mo. \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_
- c. Next office visit Mo. \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_
- d. Frequency  Weekly  Monthly  Other (specify) \_\_\_\_\_

### 5. PROGRESS:

- (a) Has patient .....  Recovered?  Improved?  Unchanged?  Retrogressed?
  - (b) Is patient .....  Ambulatory?  House confined?  Bed confined?  Hospital confined?
- If "Hospital Confined", give Name and Address of Hospital \_\_\_\_\_
- Confined from \_\_\_\_\_ through \_\_\_\_\_

**6. CARDIAC** (if applicable)

Functional Capacity (American Heart Assoc. standards)  Class 1 (No limitation)  Class 2 (Slight limitation)  
 Class 3 (Marked limitation)  Class 4 (Complete limitation)

**7. CURRENT FUNCTIONAL ABILITY**

A. In an 8 hour day, what is the maximum number of hours your patient could perform each of these levels of activity? (please indicate appropriate number of hours):

- \_\_\_ Hrs. Sedentary Activity      10 lbs. maximum lifting or carrying articles. Walking/standing on occasion. Sitting 6 to 8 hours.
- \_\_\_ Hrs. Light Activity          20 lbs. maximum lifting, carrying 10 lbs. articles frequently, most jobs involving standing with a degree of pushing and pulling. Standing 6 to 8 hours.
- \_\_\_ Hrs. Medium Activity        50 lbs. maximum lifting with frequent lifting/carrying of up to 25 lbs. Frequent walking and standing.
- \_\_\_ Hrs. Heavy Activity         100 lbs. maximum lifting, frequent lifting/carrying of up to 50 lbs. Frequent walking and standing.

B. Please check appropriate box:

	Occasionally 0% to 33%	Frequency 33% to 66%	Continuously 66% to 100%
Bending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneeling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Squatting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crawling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push/pull	<input type="checkbox"/> No. of lbs. _____	<input type="checkbox"/> No. of lbs. _____	<input type="checkbox"/> No. of lbs. _____
Lifting (lbs.)	<input type="checkbox"/> No. of lbs. _____	<input type="checkbox"/> No. of lbs. _____	<input type="checkbox"/> No. of lbs. _____

What is this assessment based on?  observed activity  measured capacity  physical therapy report

C. Please list current restrictions (activities which should not be performed) and limitations (activities which can not be performed) from activities not addressed above (i.e. driving, working at heights, etc.) Please be specific. \_\_\_\_\_

D. Upper Extremity Function - Please indicate upper extremity functional capabilities:

Simple grasp	<input type="checkbox"/> Left	<input type="checkbox"/> Right	Comments _____
Pinch	<input type="checkbox"/> Left	<input type="checkbox"/> Right	Comments _____
Fine manipulation	<input type="checkbox"/> Left	<input type="checkbox"/> Right	Comments _____
Power grip	<input type="checkbox"/> Left	<input type="checkbox"/> Right	Comments _____
Repetitive motion	<input type="checkbox"/> Left	<input type="checkbox"/> Right	Comments _____

**8. MENTAL HEALTH ABILITY** (if applicable)

What behavior, attitudes or functional impairments are contributing to any restrictions and/or limitations related to a mental health condition?

**9. RETURN TO WORK PLAN**

- a. Have you discussed a return to work plan with your patient?  Yes  No
- b. The date you released patient to return to work: \_\_\_\_/\_\_\_\_/\_\_\_\_  Full-time  Reduced hours    Number of hours: \_\_\_\_\_  
MO.    DAY    YEAR
- c. Please identify your recommendations for any job modifications that would enable the patient to work.  
\_\_\_\_\_

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 act, which is a crime and subjects such person to criminal and civil penalties.

**ATTENDING PHYSICIAN'S SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

**PHYSICIAN'S NAME (PLEASE PRINT)** \_\_\_\_\_

**DEGREE/SPECIALTY** \_\_\_\_\_

**TELEPHONE NUMBER** (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ **FAX NUMBER** (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ **TAX ID #** \_\_\_\_\_

**OFFICE ADDRESS** \_\_\_\_\_

NUMBER/STREET

CITY OR TOWN

STATE

ZIP CODE

**PLEASE RETURN COMPLETED FORM TO YOUR PATIENT/THE EMPLOYEE**