



P.O. Box 100102 • Columbia, South Carolina 29202-3102
803-735-1251 Ext. 45922 • 800-753-0404
803-754-1153 (Claims Fax) • www.CompanionLife.com

DISABILITY INSURANCE CLAIM FORM

FRAUD WARNING: *Any person who knowingly, and with intent to injure, defraud or deceive any insurance company, files a statement of claim containing any false, incomplete or misleading information is guilty of a felony.*

To prevent delays, complete claim in its entirety. Incomplete claims will be returned.

PART I – INSURED INFORMATION

1. Insured's Name FirstMiddleLast			2. ID Number			3. Date of Birth Mo. Day Yr.		
4. Insured's Address StreetCityStateZIP								
5. Insured's Sex ☐ Male ☐ Female			6. Job Description and Duties					
7. If disability is due to an accident, did injury occur at work? ☐ Yes ☐ No, If yes, have you filed a Workers Compensation claim? ☐ Yes ☐ No								
8. I AUTHORIZE ANY PHYSICIAN, MEDICAL PRACTITIONER, HOSPITAL, CLINIC, DRUG AND ALCOHOL TREATMENT FACILITY, OTHER HEALTH FACILITY, CONSUMER REPORTING AGENCY, THE MEDICAL INFORMATION BUREAU, SOCIAL SECURITY ADMINISTRATION, INSURANCE OR REINSURANCE COMPANY, OR EMPLOYER TO RELEASE ANY AND ALL MEDICAL AND NON-MEDICAL INFORMATION ABOUT ME IN ITS POSSESSION TO COMPANION LIFE INSURANCE COMPANY OR ITS LEGAL REPRESENTATIVES. MEDICAL INFORMATION MEANS ALL INFORMATION IN THE POSSESSION OF OR DERIVED FROM PROVIDERS OF HEALTH CARE REGARDING MY MEDICAL HISTORY, MENTAL OR PHYSICAL CONDITION, OR TREATMENT. I UNDERSTAND THAT COMPANION LIFE WILL NOT RELEASE ANY INFORMATION OBTAINED TO ANY PERSON OR ORGANIZATION EXCEPT TO REINSURANCE COMPANIES, THE MEDICAL INFORMATION BUREAU, OR OTHER PERSONS OR ORGANIZATIONS PERFORMING BUSINESS OR LEGAL SERVICES IN CONNECTION WITH MY APPLICATION, CLAIM, OR AS MAY BE LAWFULLY PERMITTED, OR AS I MAY FURTHER AUTHORIZE. I KNOW THAT I MAY REQUEST AND RECEIVE A COPY OF THIS AUTHORIZATION. I AGREE THAT A PHOTOCOPY OF THIS AUTHORIZATION SHALL BE AS VALID AS THE ORIGINAL. I AGREE THAT THIS AUTHORIZATION SHALL BE VALID FOR THE DURATION OF MY CLAIM.								
SIGNATURE OF EMPLOYEE _____ PHONE NO. () _____ DATE _____								

PART II – PHYSICIAN INFORMATION

9. Date first treated for this disability Mo. Day Yr.				10. Dates certified disabled and unable to work From: Mo. Day Yr. Thru Mo. Day Yr.								11. If hospitalized, date admitted Mo. Day Yr.			
12. Nature of Disability ☐ Accident ☐ Sickness ☐ Maternity (If Accident or Maternity, please complete reverse side of this form.)															
13. Diagnosis						14. Diagnosis Code						15. Prognosis			
16. Physical Findings (list all test results, or enclose test)															
Test _____				Date _____				Results _____							
Test _____				Date _____				Results _____							
Blood Pressure (Systolic) _____						(Diastolic) _____						(Date) _____			
Remarks: _____															
TREATMENT															
Date of onset of this condition? _____ List all dates of treatment for this condition since patient ceased work _____ _____ Date of next office visit _____															
Has patient been referred to any other physician ☐ Yes ☐ No Date(s) _____															
If "Yes," name and address _____ Specialty _____															
Nature of treatment for this condition (including surgery/medications) _____ _____															
Was patient hospitalized for this condition? ☐ Yes ☐ No If "Yes," date(s) admitted _____ date(s) discharged _____															
Name and address of hospital(s) _____															
Was surgery performed? ☐ Yes ☐ No If "Yes," Date _____ Procedure _____ CPT Code _____															
Progress (please check one) ☐ Recovered ☐ Improved ☐ Unchanged ☐ Retrogressed															
17. IMPAIRMENT															
What are the patient's current physical limitations and restrictions?															
☐ No limitation of functional capacity; capable of heavy work, no restrictions. (Lifting 100 lbs. maximum with frequent lifting and/or carrying objects weighing up to 50 lbs.)															
☐ Medium manual activity. (Lifting 50 lbs. maximum with frequent lifting and/or carrying of objects weighing up to 25 lbs.)															
☐ Slight limitation of functional capacity; capable of light work. (Lifting 20 lbs. maximum with frequent lifting and/or carrying of objects weighing up to 10 lbs. Even though the weight lifted may be only a negligible amount, a job is in this category when it involves sitting most of the time with a degree of pushing and pulling of arm and/or leg controls, or when it requires walking or standing to a significant degree.)															
☐ Moderate limitation of functional capacity; capable of clerical/administrative (sedentary) activity. (Lifting 10 lbs. maximum and occasionally lifting and/or carrying articles. Although a sedentary job is defined as one which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties.)															
☐ Severe limitation of functional capacity; incapable of minimal (sedentary) activity.															
What is the psychiatric impairment (if applicable)?															
☐ Inadequate information to make assessment.															
☐ Essentially good functioning in all areas. Occupationally and socially effective.															
☐ Slight difficulty in occupational functioning, but generally functioning well. Has some meaningful interpersonal relationships.															
☐ Moderate impairment in occupational functioning. Limited in performing some occupational duties.															
☐ Major impairment in several areas – work, family relations. Avoidant behavior, neglects family, is unable to work.															
☐ Inability to function in almost all areas.															

DETAILS OF ACCIDENT OR MATERNITY CLAIM – TO BE COMPLETED BY THE PHYSICIAN

18-A. ACCIDENT: On what date was the patient injured? _____ Where (place) was the patient injured? _____ _____ _____ How was the patient injured? _____ _____ _____ _____ _____ _____	18-B. MATERNITY: Estimated Date of Delivery (EDC) _____ Prenatal Complications _____ _____ _____ Date of Delivery _____ Post-partum Complications _____ _____ _____ _____
19. I have treated the insured for the condition listed and, for the period claimed. The insured has been under my continuous care. Physician's Name and Address (Please type or print.) _____ _____ _____ Phone No. (Indicate area code.) _____ Date _____ Physician's Signature _____ Has the above patient been released to return to work? ☐ Yes Date to Return (Mo./Day/Yr.) _____ ☐ No Approximate Date of Return (Mo/Day/Yr.) _____ ☐ No Will not return to work. Disability is total and permanent. ☐ Date of Next Office Visit _____	

PART III – EMPLOYER INFORMATION

20. Workers' Compensation: Is there possible Workers' Compensation liability? ☐ Yes (If yes, complete this section.) ☐ No Date accident/sickness reported _____ Date Workers' Compensation claim filed _____ Current status of Workers' Compensation claim: ☐ Approved ☐ Denied ☐ Pending ☐ Not Filed Name and Address of Workers' Compensation Payment Office _____					
21. A. Is employee eligible to receive salary continuation, PTO, sick leave, vacation, etc? ☐ Yes ☐ No If Yes, please provide dates from _____ to _____. B. Is employee subject to child support withholdings? ☐ Yes ☐ No If Yes, provide appropriate documentation with claim.					
22. Is employee enrolled in the Companion Long Term Disability plan? ☐ Yes ☐ No If "Yes," effective date: _____					
23. Name and Address of Group			Phone No. and Area Code	24. Group No.	
			()		
25. I certify that the above insured was a full-time active employee and that he or she did not perform any duties pertaining to his or her occupation during the period claimed above in block 10. Employer's Signature _____ Date _____					
26. First Day Not at Work			27. Date Returned to Work		
Mo.	Day	Yr.	Mo.	Day	Yr.
			28. Amount of Weekly Earnings:		29. Amount of Weekly Benefit
			\$ _____		\$ _____

INSTRUCTIONS FOR FILING CLAIM FOR WEEKLY DISABILITY BENEFITS

The reverse of this form should be completed by the insured employee, the employer and the insured’s attending physician as soon as possible after the onset of the accident or sickness for which claim is made. If accident or maternity, details must be stated above.

The date we need a doctor’s statement of continuing disability will be indicated on the check stub each week. To prevent delays in weekly disability payments, submit the doctor’s statement to Companion Life 10 days before this date occurs.

Weekly disability checks are mailed to the employer’s address.

When your employee returns to work, please call our Claims department to notify us immediately and then follow up with the final claim. Notifications can be faxed to:

(803) 735-1251 Ext. 45922
(803) 754-1153 FAX

Claims should be forwarded to:

Companion Life Insurance Company
Attention: Claims Department
P.O. Box 100102
Columbia, South Carolina 29202-3102

By furnishing this blank form and investigating the claim, Companion Life Insurance Company shall not be held to admit the validity of any claim, or to waive or breach any terms or conditions of the policy.