

Sun Life Assurance Company of Canada

Short Term Disability Claim Packet – Attending Physician



Instructions

Please be sure to submit the Attending Physician's Statement to CM Regent Solutions.

The Attending Physician must:

- Physician must completely fill out and sign the Physician Statement.

- Have all the physicians keep a copy of your signed authorization for their files.

E-mail the completed claim form to:

CM Regent Solutions
300 Sterling Parkway
Mechanicsburg, PA 17050

EBSS@cmregent.com

Fax: 866.691.6291

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Attending Physician's Statement

Group STD policy number

1 Information About the Patient

Patient is responsible for any costs associated with the completion of this form.

Name of patient (first, middle initial, last) <input type="checkbox"/> M <input type="checkbox"/> F	Social Security number	Date of birth (m/d/y)	
Name of employer (parent company name)			
Patient home street address	City	State	Zip code
Patient home phone number	Patient work phone number		

2 Physician Information

- Complete all sections – any missing information may result in a delay to your patient
- Print clearly
- Submit information to CM Regent Solutions by e-mail at EBSS@cmregent.com or by fax at 866.691.6291

Name of attending physician (first, middle initial, last)	Specialty	Tax ID#	
Street address	City	State	Zip code
Phone number	Fax number		
List other physicians treating for this condition			
Name of physician: Specialty:	Phone: Fax:		
Name of physician: Specialty:	Phone: Fax:		

3 Diagnosis and History

Your response is required and affects the patient's benefit. Failure to complete this information may cause the patient financial hardship due to lack of benefit payments.

Primary Diagnosis (include any complications)	ICD-10 Code
Secondary Diagnosis (if applicable)	ICD-10 Code
Has patient ever had same or similar condition? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, date occurred:	
If pregnancy, provide the following: Expected delivery date: Actual delivery date:	Delivery type: <input type="checkbox"/> Normal <input type="checkbox"/> C-Section
List any complications pre or post delivery that would extend this disability longer than a normal pregnancy.	
Is condition due to injury/sickness arising out of patient's employment? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown	

Describe objective or abnormal findings and date.

If you need more room, check here and attach a separate sheet.

<input type="checkbox"/> X-ray <input type="checkbox"/> EKG <input type="checkbox"/> MRI <input type="checkbox"/> PFT <input type="checkbox"/> Ultrasound <input type="checkbox"/> Other data (e.g. Labs)
Date(s):
Findings:

4 Treatment Details

Start date of disability	Date of first office visit	Date of last office visit	Date of next office visit
Was Emergency Room care required for condition?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Name of hospital	Date	Phone number	

Check all that apply and describe type, frequency and treatment

<input type="checkbox"/> Surgery	<input type="checkbox"/> Medications prescribed	<input type="checkbox"/> Therapy	<input type="checkbox"/> Behavioral intervention	<input type="checkbox"/> Other
Date(s):				
Procedure/Treatment:				
Is patient:	<input type="checkbox"/> Hospital confined	Date from:	Date to:	
	<input type="checkbox"/> House confined	<input type="checkbox"/> Bed confined	<input type="checkbox"/> Ambulatory	
Hospital name:			Phone:	

5 Restrictions and Limitations

Describe what the patient can do .	From:
	To:
Describe what the patient should not do .	From:
	To:
Is patient capable of working with these restrictions/limitations?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Full-Time: 8+ hours/day	<input type="checkbox"/> Part-Time: _____ hours/day

Indicate class of impairment - As defined in federal dictionary of occupation titles

Physical Impairment

<input type="checkbox"/> Class 1 – No limitation	<input type="checkbox"/> Class 4 – Moderate limitation
<input type="checkbox"/> Class 2 – Slight limitation	<input type="checkbox"/> Class 5 – Severe limitation
<input type="checkbox"/> Class 3 – Medium limitation	

Mental Impairment (if applicable)

Current DSM diagnosis

<input type="checkbox"/> Class 1 – No limitation <input type="checkbox"/> Class 2 – Slight limitation <input type="checkbox"/> Class 3 – Moderate limitation <input type="checkbox"/> Class 4 – Marked limitation <input type="checkbox"/> Class 5 – Severe limitation	
Do you believe this patient is competent to endorse/direct the use of proceeds? <input type="checkbox"/> Yes <input type="checkbox"/> No	

6 Return-to-Work

Indicate the specific date or recovery period for when the patient will recover sufficiently to perform duties.

<ul style="list-style-type: none"> Return to patient's occupation full-time: Date: _____ -or- <ul style="list-style-type: none"> <input type="checkbox"/> 1-2 w ks <input type="checkbox"/> 2-3 w ks <input type="checkbox"/> 3-4 w ks <input type="checkbox"/> 4-5 w ks <input type="checkbox"/> 5-6 w ks <input type="checkbox"/> 6-7 w ks <input type="checkbox"/> 7-8 w ks <input type="checkbox"/> 2 months or more <input type="checkbox"/> Other: _____ <input type="checkbox"/> Never Return to patient's occupation part-time: Date: _____ -or- <ul style="list-style-type: none"> <input type="checkbox"/> 1-2 w ks <input type="checkbox"/> 2-3 w ks <input type="checkbox"/> 3-4 w ks <input type="checkbox"/> 4-5 w ks <input type="checkbox"/> 5-6 w ks <input type="checkbox"/> 6-7 w ks <input type="checkbox"/> 7-8 w ks <input type="checkbox"/> 2 months or more <input type="checkbox"/> Other: _____ <input type="checkbox"/> Never
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7 Certification and Signature

I certify that the above statements are true and complete. I have read or had read to me the fraud warning for my state.

Attending Physician Signature (original signature required) X	Date
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Fraud Warnings

State law requires that we notify you of the following:

General fraud warning: 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.

AK: A person who knowingly and with intent to injure, defraud, or deceive an insurance company files a claim containing false, incomplete, or misleading information may be prosecuted under state law.

AL: 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.

AR, LA, MA, MN, NM, TX, and WV: 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.

AZ: 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.

CA: For your protection California law requires the following to appear on this 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: 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.

DC: 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.

DE, ID, and IN: Any person who knowingly, and with intent to injure, defraud or deceive any insurer, files a statement of claim containing any false, incomplete or misleading information is guilty of a felony.

FL: 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.

KS: 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 may be guilty of insurance fraud as determined by a court of law.

KY: Any person who knowingly and with intent to defraud any insurance company or other person files a 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.

MD: 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.

ME: 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.

NH: Any person who, with a purpose to injure, defraud, or deceive any insurance company, files a statement of claim containing any false, incomplete, or misleading information is subject to prosecution and punishment for insurance fraud, as provided in RSA 638:20.

NJ: Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.

OH: 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.

OK: 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.

OR: Any person who, with intent to defraud or knowingly providing false information may be guilty of fraud and may be subject to civil or criminal penalties.

PR: 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.

RI: 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.

TN and WA: 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.

VA: 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 have violated state law.

VT: Any person who knowingly presents a false statement in an application for insurance may be guilty of a criminal offense and subject to penalties under state law.