



P.O. Box 1271, M/S E3A
Portland, OR 97207

LifeMap Assurance Company™

Life and Disability Claims Department
Toll-free 1 (800) 286-1129
Fax (855) 733-4615
claims@lifemapco.com

Statement of Long Term Disability

LifeMapCo.com

Claim Filing Instructions

This Statement of Long Term Disability (LTD) includes the forms required to apply for LTD benefits.
If a form is received incomplete, unsigned or undated, it will be returned to you for completion.

Have you...

1. completed in full, signed and dated the Employee's Statement?
2. signed and dated the Authorization for Release of Information?
3. had the physician treating you complete, sign and date the Attending Physician's Statement, and had it returned to you?
4. had your Employer complete, sign and date the Employer's Statement, and had it returned to you?

You are responsible for ensuring all forms are completed and returned to our office.
Forms can be sent to LifeMap via:

Email: **claims@lifemapco.com**

Fax: **(855) 733-4615**

Regular Mail: **LifeMap Assurance Company
Attn: Life and Disability Claims Department
PO Box 1271 MS E3A
Portland, OR 97207-1271**

If you have any questions, please call the LifeMap Life and Disability Claims Department at (800) 286-1129.

Please note, you must notify LifeMap promptly if:

- Your medical condition improves so that you would be able to work, even though you have not yet returned to work.
- You go to work in any capacity for any employer, or as a self-employed person.



Statement of Long Term Disability

Employee's Statement

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Employee

Employee Name (Last, First, Middle Initial)				Social Security Number	
Employee Mailing Address		Street & Number		City	State Zip
Home Phone Number ()	Cell Phone Number ()	Date of Birth		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Right-handed <input type="checkbox"/> Left-handed
Marital Status <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed	Is your spouse employed? <input type="checkbox"/> Yes <input type="checkbox"/> No	Number of dependent children:	Names and dates of birth of spouse and dependent children:		

Employment

Employer Name		Employer Phone Number ()	Policy Number		
Employer's Mailing Address		Street & Number		City	State Zip
Your Occupation & Title		List essential duties of your job at the time of disability:			
How many hours were you regularly working per week with your present employer?	Gross Annual Salary (not including overtime) during the 12 months just prior to your disability - for this employer only: \$		Please indicate how you are paid (check all that apply): <input type="checkbox"/> hourly <input type="checkbox"/> salaried <input type="checkbox"/> other _____ <input type="checkbox"/> bonuses <input type="checkbox"/> commissions		
Date you returned (or expect to return) to work on a part-time basis:			Date you returned (or expect to return) to work on a full-time basis on:		

Medical Information

Date First Treated:		First date unable to work because of disability:			
Date of injury or date first noticed symptoms of illness:		Have you ever had the same or similar condition in the past? <input type="checkbox"/> No <input type="checkbox"/> Yes, when?			
Is your injury or illness related to your occupation? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	Did you file for workers' compensation? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not Yet	Workers' compensation claim status: <input type="checkbox"/> Pending <input type="checkbox"/> Approved <input type="checkbox"/> Denied (include copy of denial letter)			
Describe how and where injury occurred or describe the onset and nature of your medical condition including symptoms (If more space is needed, please attach sheet of paper.):					

Attending Physician

Primary Physician:				Phone Number ()	Hospital	
Street Address	City	State	Zip	Fax Number ()	Date Admitted	Date Discharged

Please complete the following page.



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Employee's Statement (continued)

Employee Name (Last, First, Middle Initial)	Social Security Number
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Other Sources of Income

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

Type	Amount	Date Began	Date Ended	Type	Amount	Date Began	Date Ended
Sick Pay				Salary Continuance			
Social Security (SSA) (disability or retirement)				Retirement Income (normal, early or disability)			
SSA Dependent's				State Disability			
Workers' Compensation				Unemployment Compensation			
Local, State or National Association or Society Disability Income Plan				Other STD/LTD Benefits:			
				Other (describe):			

Have you applied, or do you plan to apply for benefits described above? Yes No

Type: _____ Date Application Filed: _____

Type: _____ Date Application Filed: _____

Tax Withholding (if your LTD benefits are taxable)

If your request for benefits is approved, do you want us to withhold federal income taxes? Yes No

Indicate amount to withhold: \$ _____ (per month) **OR** Indicate filing status: Married Single **AND** number of deductions: _____

If your request for benefits is approved, do you want us to withhold state income taxes? Yes No

Indicate amount to withhold: \$ _____ (per month) **OR** Indicate filing status: Married Single **AND** number of deductions: _____

Acknowledgement

I certify that the answers I have made to the above questions are complete and true to the best of my knowledge and belief.
I acknowledge that I have read the fraud notice on page 4 of this form.

▶ _____ ▶ _____
Employee's Signature Date

Complete Authorization for Release of Information form on page 5.

Statement of Long Term Disability

Insurance Fraud Warning

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.

California Residents: 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.

Colorado 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 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.

District of Columbia 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.

Florida Residents: Any person who, knowingly and with intent to injure, defraud, or deceive any employer or employee, insurance company, or self-insured program, files a statement of claim containing any false or misleading information is guilty of a felony of the third degree.

Hawaii Residents: For your protection, Hawaii law requires you to be informed that presenting a fraudulent claim for payment of a loss or benefit is a crime punishable by fines or imprisonment, or both.

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

New York 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 insurance act, which is a crime 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.

Puerto Rico Residents: Any person who knowingly and with the intention to defraud includes false information in an application for insurance or file, assist, or abet in the filing of a fraudulent claim to obtain payment of a loss or other benefit, or files, more than one claim for the same loss or damage, commits a felony and if found guilty shall be punished for each violation with a fine of no less than five thousand dollars (\$5,000), not to exceed ten thousand dollars (\$10,000); or imprisoned for a fixed term of three (3) years, or both. If aggravating circumstances exist, the fixed jail term may be increased to a maximum of five (5) years; and if mitigating circumstances are present, the jail term may be reduced to a minimum of two (2) years.

Arkansas, Louisiana, Maryland, New Mexico, Rhode Island and West Virginia Residents: Any person who knowingly presents a false or fraudulent claim for payment for 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.

Maine, Tennessee, Virginia and Washington Residents: 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.

Alaska, Kansas and Oregon Residents: Any person who knowingly provides false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company may be guilty of a crime. Penalties may include imprisonment, fines, and denial of insurance benefits.

Delaware, Idaho, Indiana and Oklahoma Residents: 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.



Statement of Long Term Disability

Authorization for Release of Information (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 LifeMap Assurance Company (LifeMap) and to its authorized claims administrator, Disability Reinsurance Management Services, Inc. (Disability RMS), *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 LifeMap and/or Disability RMS 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 LifeMap and/or Disability RMS 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 LifeMap and/or Disability RMS in writing, of my revocation. However, such revocation is not effective to the extent that LifeMap and/or Disability RMS 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 the ability of LifeMap and/or Disability RMS 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 LifeMap and/or 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 LifeMap and/or DRMS shall comply, as applicable with the provisions of Title 8, Section 4724 (20) of the Vermont Statutes.

▶ _____ ▶
Employee/Primary Insured's Full Name (please print clearly) Social Security Number

▶ _____ ▶
Employee/ Primary Insured's Signature Date Signed

If signature is provided by legal representative (e.g. Attorney in Fact, guardian or conservator), please attach documentation of legal status.

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Hawaii Residents: For your protection, Hawaii law requires you to be informed that presenting a fraudulent claim for payment of a loss or benefit is a crime punishable by fines or imprisonment, or both.

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

New York 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 insurance act, which is a crime 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.

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Delaware, Idaho, Indiana and Oklahoma Residents: 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.



Statement of Long Term Disability

Attending Physician's Statement

This statement must be filled-in completely by a physician without expense to insurance company.

Patient Information

Employee Name (Last, First, Middle Initial)		Social Security Number	Employer Name
Height	Weight	Blood Pressure/Date Taken	<input type="checkbox"/> Left-handed <input type="checkbox"/> Right-handed

Information about Diagnosis

Diagnosis	ICD Code(s)
Symptoms	
Comorbid Conditions	
Objective findings (including current X-rays, EKGs, Laboratory Data and any clinical findings)	
Date symptoms first appeared or injury occurred:	Date you recommended the patient stop working:
Patient's condition is due to: <input type="checkbox"/> Illness <input type="checkbox"/> Accident	Has patient ever had the same or a similar condition? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, when
Is condition arising out of patient's employment? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you complete Workers' Compensation claim form? <input type="checkbox"/> Yes <input type="checkbox"/> No

Information about Treatment

Date of first visit for this condition:	Frequency of subsequent visits: <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other _____	Next office visit:
Nature of treatment (including surgery and medications prescribed, if any, including dosage and frequency)		
Hospital Admission Date:	Hospital Discharge Date:	Was Surgery Performed? <input type="checkbox"/> Yes <input type="checkbox"/> No
Name of Procedure:		Date of Surgery:
		Surgery/Post-Operative Complications: <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please describe:
Was patient treated by another provider(s) for this disability? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, please provide dates, name and address of provider(s):		

For Pregnancy Disability Only

Date of Last Menstrual Period	Expected Date of Delivery	Actual Date of Delivery	<input type="checkbox"/> Vaginal <input type="checkbox"/> C-Section
Are there any present complications or anticipated difficulties: Pregnancy <input type="checkbox"/> Yes <input type="checkbox"/> No Delivery <input type="checkbox"/> Yes <input type="checkbox"/> No Post Partum <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes" to any of these, please describe in detail:			

Please complete the following page.



Statement of Long Term Disability

Attending Physician's Statement (continued)

Employee Name (Last, First, Middle Initial)

Assessment of Physical Impairment (as defined in the Federal Dictionary of Occupational Titles)

Class 1 -- No Limitation of functional capacity; capable of heavy work* No restrictions (0-10%)

Class 2 -- Medium manual activity* (15-30%)

Class 3 -- Slight limitation of functional capacity; capable of light work* (35-55%)

Class 4 -- Moderate limitation of functional capability; capable of clerical/administrative (sedentary) activity* (60-70%)

Class 5 -- Severe limitation of functional capacity; incapable of minimal (sedentary) activity* (75-100%)

Assessment of Mental Impairment (if applicable)

Class 1 -- Patient able to function under stress and able to engage in interpersonal relations (No limitations).

Class 2 -- Patient able to function in most stress situations and engage in limited interpersonal relations (Slight limitation).

Class 3 -- Patient able to engage in only limited stress situations and engage in limited interpersonal relations (Moderate limitation).

Class 4 -- Patient unable to engage in stress situations or engage in interpersonal relations (Marked limitation).

Class 5 -- Patient has significant loss of psychological, physiological, personal and social adjustment (Severe limitation).

Assessment of Current Functional Ability

Describe current restrictions (activities which should not be performed by the patient):

Describe current limitations (activities which cannot be performed by the patient):

Related to a mental health condition, describe behaviors, attitudes or functional impairments that are contributing to the patient's restrictions and/or limitations:

Describe factors delaying recovery (if applicable): Malingering Exaggeration Other, please specify:

Is the patient competent to manage insurance benefits? Yes No
If no, is the patient competent to appoint someone to help manage the insurance benefits? Yes No

Return to Work Plan

Date you released patient to return to work:	<input type="checkbox"/> Full Time <input type="checkbox"/> Modified Duties <input type="checkbox"/> Part Time <input type="checkbox"/> Reduced Hours	Number of hours per week:
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How long do you expect these limitations and restrictions to impair your patient?
 Date: Unable to determine, follow up appointment: Permanently

Please identify your recommendations for any job modifications that would enable the patient to work:

Information about Physician

Physician's Name (Please Print)	Degree/Specialty	Phone Number ()
Office Address	City State Zip	Fax Number ()

Acknowledgement

I certify that the answers I have made to the above questions are complete and true to the best of my knowledge and belief. I acknowledge that I have read the fraud notice on page 10 of this form.

▶ _____ ▶ _____
Attending Physician's Signature Date

Please return completed form to your patient.

Statement of Long Term Disability

Insurance Fraud Warning

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