

The information requested in items 1 to 4 should also be entered on the upper section of the "Attending Physician's Statement".

## CLAIMANT'S STATEMENT

1 Last Name: \_\_\_\_\_ 2 First Name: \_\_\_\_\_

3 Contract No.: 29 880 4 Social Insurance No.: \_\_\_\_\_  
Group No. Employee No.

5 Complete address: \_\_\_\_\_  
 \_\_\_\_\_ Postal Code: \_\_\_\_\_

6 Home telephone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Other: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Extension: \_\_\_\_\_

7 Gender: F  M  8 Date of birth: \_\_\_\_\_ Y \_\_\_\_\_ M \_\_\_\_\_ D \_\_\_\_\_

9 Since you stopped working, have you had any other employment? no  yes  → Date of beginning: \_\_\_\_\_ Y \_\_\_\_\_ M \_\_\_\_\_ D \_\_\_\_\_

If yes, specify the nature of the employment: \_\_\_\_\_

10 Is the disability the result of an accident? no  yes  → Describe the circumstances, including date and location.  
 \_\_\_\_\_  
 \_\_\_\_\_

11 Have you already undergone a medical assessment related to your disability? no  yes

12 Have you applied for benefits under any of the following programs?

PROGRAM	If yes, date on which payment of benefits began: _____ Y _____ M _____ D _____	NO	IF YES			IF DENIED	
		<input type="checkbox"/>	Pending	Accepted	Declined	Do you intend to appeal this decision?	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	yes
Employment Insurance (HRDC)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worker's Compensation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Any provincial or Federal Agency		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Automobile Insurance Law or any other compensation program		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>PLAN</b>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirement or Pension Plan		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salary Continuance Plan		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health or Welfare Plan		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Any other group insurance plan:		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**NOTE: PLEASE INCLUDE COPIES OF ANY DOCUMENTS RECEIVED FROM THESE SOURCES, INCLUDING ANY BENEFIT PAYMENT STATEMENTS.**

I hereby authorize any physician, any other professional and participating party in the health care and rehabilitation sectors as well as any public or private health or social services institution, any insurance company, as well as any insurer, any public or private institution, any information officer, any market intermediary, any employer or ex-employer, the policyholder as well as any other person who has files or personal information, especially medical information to provide to SSQ Life Insurance Company Inc. (hereinafter SSQ) or to its subsidiaries, affiliates, third party administrators and reinsurers, all information that he, she or it has, for the following purposes: to investigate and confirm the accuracy of my claim, determine my eligibility for benefits, administer my claim, assess and facilitate my ability to return to work and administer the group benefits plan and coverage.

I also authorize SSQ to disclose this information to the persons indicated above whenever necessary, within the framework of their activities and the processing of my file.

I also authorize SSQ and my group policyholder's medical consultants to collect, use and disclose between them information about me including details relating to diagnosis, treatment, or medication, that is relevant to my claim, for the purpose of planning and managing my rehabilitation and return to work.

In the event of death, I formally authorize the policyholder, employer, beneficiary, successors or assigns, to provide to SSQ or to its subsidiaries, affiliates, third party administrators and reinsurers, when required, all information or authorizations that make possible the processing of my file.

This authorization is valid for the purposes of this contract, its amendment, extension or renewal. A photocopy or electronic copy of this authorization shall be as valid as the original.

### Important

The following sections must be completed and signed:

- By the insured**
  - Claimant's Statement (1 to 14)
  - Upper section of Attending Physician's Statement
- By the plan administrator**
  - Employer's Statement
- By the attending physician**
  - Attending Physician's Statement

13 \_\_\_\_\_ Signature \_\_\_\_\_ 14 \_\_\_\_\_ Y \_\_\_\_\_ M \_\_\_\_\_ D \_\_\_\_\_ Date \_\_\_\_\_

1 Last Name: \_\_\_\_\_ 2 First Name: \_\_\_\_\_  
 3 Contract No.: 29 880 Employee No. \_\_\_\_\_ 4 Social Insurance Number: \_\_\_\_\_  
Group No.

**ATTENDING PHYSICIAN'S STATEMENT (To be completed in block letters and returned to patient)**

**1. DIAGNOSIS**

1.1 Primary: \_\_\_\_\_  
 1.2 Secondary: \_\_\_\_\_  
 1.3 Current symptoms: \_\_\_\_\_  
 1.4 Degree of severity: mild  moderate  severe  with psychotic manifestations   
 1.5 Instigating or complicating factors: \_\_\_\_\_  
 1.6 Date symptoms first appeared: | | Y | | | M | | | D | |  
 1.7 Is this an initial occurrence? no  yes   
 If no, specify the date of previous occurrence(s): | | Y | | | M | | | D | | | Y | | | M | | | D | | | Y | | | M | | | D | |

**2. TREATMENT**

2.1 Medication (name, dosage, date of prescription): \_\_\_\_\_  
 2.2 Is the patient seeing a psychotherapist or other practitioner? no  yes   
 If yes, name of practitioner: \_\_\_\_\_ Specialization: \_\_\_\_\_  
 2.3 a) Hospitalization: from \_\_\_\_\_ to \_\_\_\_\_ Name of hospital: \_\_\_\_\_  
 b) Clinical observation: number of hours: \_\_\_\_\_

**3. FOLLOW-UP**

3.1 Please indicate all dates of visits for the current condition:

Month	Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	

3.2 Frequency of follow-up for this disability: \_\_\_\_\_  
 3.3 Has the patient been referred for psychiatric examination or treatment? no  yes  Name of physician: \_\_\_\_\_  
 Please attach a copy of your clinical notes and any test results or consultant reports available.

**4. PROGNOSIS**

4.1 In your opinion, is this patient totally incapable of performing his/her normal work duties? no   
 yes  → from \_\_\_\_\_ to \_\_\_\_\_ inclusive.  
 4.2 Anticipated date of return to work: | | Y | | | M | | | D | |

**5. PHYSICIAN IDENTIFICATION**

5.1 Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_  
 5.2 Address: \_\_\_\_\_  
 5.3 Licence No.: \_\_\_\_\_ Telephone: ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_  
 General practitioner  Specialist  → Specify: \_\_\_\_\_  
 Signature \_\_\_\_\_ Date: | | Y | | | M | | | D | |

**NOTE: ANY COSTS FOR COMPLETING THIS FORM ARE THE RESPONSABILITY OF THE PATIENT**





MAIL COMPLETED FORM TO:  
Manion Wilkins & Associates Ltd.  
500-21 Four Seasons Place  
Etobicoke, ON M9B 0A5  
c/o Disability Claims Administration

# DIRECT DEPOSIT APPLICATION FORM

## Plan Member Identification

<input type="text"/>		<input type="text"/>	
Surname		First Name	
<input type="text"/>		<input type="text"/>	
Telephone Number		Plan Name or Group Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City, Town, or Village	Province	Postal Code

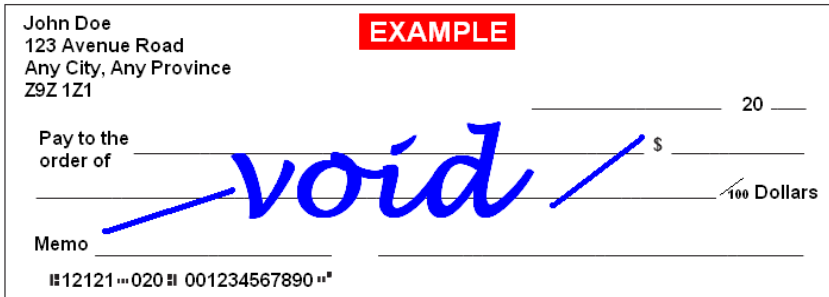
**Email Notification:** Complete to receive email notification of claim status. If no email is provided, all correspondence will be sent via Canada Post.

Email Address

## Bank Account Information

For CHEQUING ACCOUNTS, please securely attach a voided cheque to form.

For SAVINGS ACCOUNTS, please have your banking institution attach a statement of banking information.



## Acknowledgement

Confidentiality of plan member information is of utmost importance to Manion Wilkins and we are committed to the highest standard of information privacy. Visit our Privacy Policy at <http://www.manionwilkins.com> for more information.

Manion Wilkins & Associates Ltd. is not liable for misdirected, intercepted or altered e-mail communications arising from no fault of Manion Wilkins staff, but from the inherent risks associated with e-mail.

I authorize Manion Wilkins & Associates Ltd. to credit the bank account noted above. I understand that it is my responsibility to keep my bank account and contact information up-to-date. I will advise Manion Wilkins of any change to this information to avoid pre-authorized payment and notification errors.

Signature of Plan Participant

Date

**Questions?** Call: 416- 234-3513 or 1 800-663-7849 Email: [acclaims@manionwilkins.com](mailto:acclaims@manionwilkins.com)

**Administration Department Use Only**