

CHECKLIST

Applying for Benefits under the Disability Insurance (DI) Plan

There are **4 forms** included in your DI claim application package. All **4 forms** must be completed.

You can use the following checklist to ensure you have included all of the information. This will help to avoid delays in assessing your claim:

1. Complete the Employee's Statement Form 490L-M-12500-E-04-19 (G6318-E) <ul style="list-style-type: none">• Answer all questions on the form• Include a personalized 'VOID' cheque with your name pre-printed	
2. Ask your supervisor/manager to complete the Employer's Statement Form 4841-E-04-19 Ensure your manager has included: <ul style="list-style-type: none">• Your current job description• Your leave records for the past 12 months, including an explanation of leave codes and your current sick leave balance• Ensure a copy of the form is sent to the Public Service Pay Centre or your departmental Compensation services with a request to complete the Compensation Advisor form	
3. Ensure the Employer's Statement Form completed by the Compensation Advisor 4811-E-04-19 is sent to Sun Life	
4. Ask your physician/medical provider to complete the Initial Disability Insurance Medical Statement <ul style="list-style-type: none">• Ensure your physician/medical provider has included:<ul style="list-style-type: none">• A copy of their clinical notes from the time you stop working.• A copy of all test results available• If you've consulted with a specialist(s) for your condition, they must also include a copy of all consultation and assessment reports• Ensure your physician/medical provider has answered all questions on the form (must provide a diagnosis, disabling symptoms, a treatment plan and a prognosis)	

*You must send all the above information to Sun Life **6 to 8 weeks** prior to the start of benefits.

NOTE: YOU MUST SEND ALL FORMS TO SUN LIFE VIA FAX OR MAIL TO THE FOLLOWING ADDRESS:

Montreal Group Disability Management Office
Federal Government Disability Insurance Plan
Sun Life Assurance Company of Canada
P.O. Box 12500 Station CV
Montreal, QC H3C 5T6

Secure Fax: 1-866-639-7849

Visit www.sunlife.ca/DI for more information about the DI claim application process (**refer to the Employee Claim Guide**) and to get access to the application forms.

The assessment of your application will begin only when **all 4 forms** listed above are received by Sun Life. Sun Life will make a decision within **10 business days**. At the end of the assessment, you will receive one of three decisions:

- Approved application
- Declined application
- Application pending – awaiting additional information

IMPORTANT: What happens if any information is missing or the information provided is insufficient? Sun Life will not be able to make a decision until they receive the missing information that's needed to complete the assessment.

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