

# Short-Term Disability Plan Sponsor Package

## How to use this package:

<b>REVIEW</b>	<ul style="list-style-type: none"><li>The links below will take you to the Plan Sponsor's Statement and Disability Job Demands Questionnaire included in this package. The "Return to Introductory Page" link on each document will take you back to this page.</li></ul>
<b>COMPLETE</b>	<ul style="list-style-type: none"><li>You are able to save information typed into the forms.</li><li>Complete the Plan Sponsor's Statement in its' entirety.</li><li>Complete the Job Demands Questionnaire if the plan member is expected to be absent for 4 weeks or more.</li></ul>
<b>SUBMIT</b>	<p><b>FAX</b></p> <ul style="list-style-type: none"><li>Print the completed Plan Sponsor's Statement (pages 2 - 4) and Job Demands Questionnaire (pages 5 - 7, if submitting) and sign the Declarations at the end of the forms.</li><li>Fax the forms to the Sun Life Group Disability Management office that manages your claims. You do not need to mail information that you fax. Please retain the original copy for your records.</li></ul> <p><b>EMAIL OPTION</b></p> <ul style="list-style-type: none"><li>Contact your Service Representative for information on how to register your email domain for Transport Layer Security (TLS) e-mail submission.</li><li>Sun Life will not accept the confidential information contained on these forms by email unless TLS secured electronic submission is set-up.</li></ul>

▶ [Plan Sponsor's Statement for Short-Term Disability Benefits](#)

▶ [Disability Job Demands Questionnaire](#)

# Plan Sponsor's Statement Claim for Disability benefits



Sun Life commits to keeping plan members' personal information confidential.

The information on the Plan Sponsor's Statement is for the assessment of the plan member's absence from work under:

- The Short-Term Disability (STD) plan and where applicable,
- The Long-Term Disability (LTD) plan.

This statement forms part of the plan member's disability claims file. We will release this statement to the plan member if they request their file.

## 1 Plan Member information

Sun Life must receive the Plan Member's Statement, Attending Physician's Statement and this form in order to review this claim. Please complete this form in its entirety in order to avoid delays.

First name	Last name	<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of birth (dd-mm-yyyy)
Address (street number and name)			Apartment or suite
City			Province      Postal code
Home telephone number		Alternate telephone number	
Regular occupation title/Job name			

Please also submit the form *Disability Job Demands Questionnaire* if the member is expected to be absent for 4 weeks or more.

## 2 Plan Sponsor information

STD Contract number	STD Sub./Class	Member ID	STD Division/Billing group number
LTD Contract number	LTD Sub./Class	LTD Division/Billing group number	
Company name			
Address (street number and name)			
City			Province      Postal code
Contact person			
Contact's telephone number	Ext.	Email address	

## 3 Employment information

This section asks for information on the member's employment and coverage status. This part should be completed by the person most familiar with these topics (for example, the Payroll Administrator or the Plan Administrator).

Dates that pertain to the absence from work due to the current disability.

Date member started with the company (dd-mm-yyyy)	Last date of full-time duties/hours (dd-mm-yyyy)	Last date of modified work (if applicable) (dd-mm-yyyy)
---------------------------------------------------	--------------------------------------------------	---------------------------------------------------------

Was the member's employment terminated? ☐ No ☐ Yes If yes, on what date?

Date (dd-mm-yyyy)

### 3 Employment information (continued)

To the best of your knowledge, why did the member stop working?


If the disability is due to pregnancy, has or will the member receive any maternity leave? ☐ No ☐ Yes

Date maternity leave begins (dd-mm-yyyy)	Date maternity leave ends (dd-mm-yyyy)
------------------------------------------	----------------------------------------

Date member returned to full-time duties (dd-mm-yyyy)	Date member returned to modified work (dd-mm-yyyy)
-------------------------------------------------------	----------------------------------------------------

If applicable, please describe modifications
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Employment class (check all that apply)			
<input type="checkbox"/> Full-time	<input type="checkbox"/> Permanent	<input type="checkbox"/> Hourly	<input type="checkbox"/> Union
<input type="checkbox"/> Part-time	<input type="checkbox"/> Contract	<input type="checkbox"/> Salaried	
	<input type="checkbox"/> Temporary	<input type="checkbox"/> Commissioned	
	<input type="checkbox"/> Seasonal		
What is the regular number of hours per week? _____			

Is the member involved in shift work? ☐ No ☐ Yes If yes, provide details of the actual rotation schedule for the three months prior to the disability date and the planned schedule for the claimed disability period.


Are modified duties available? ☐ No ☐ Yes

Were modified duties offered? ☐ No ☐ Yes If yes, please describe duties (part-time/full-time/modified)

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Did the member accept modified duties if offered? ☐ No ☐ Yes If no, please provide details below.

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### 4 Coverage information

Effective date of member's STD coverage (dd-mm-yyyy)	
Original effective date of member's basic LTD coverage (dd-mm-yyyy)	Effective date of member's basic LTD coverage with Sun Life (dd-mm-yyyy)
Original effective date of optional LTD coverage (if any) (dd-mm-yyyy)	Effective date of member's optional LTD Coverage with Sun Life (dd-mm-yyyy)
Coverage class (if any)	Was the member required to submit evidence of insurability? <input type="checkbox"/> No <input type="checkbox"/> Yes

1. Has disability coverage ended? ☐ No ☐ Yes If yes, when?

Date (dd-mm-yyyy)

2. Have disability premiums ended? ☐ No ☐ Yes If yes, when?

Date (dd-mm-yyyy)

3. Is LTD Cost of Living Adjustment (COLA) Applicable? ☐ No ☐ Yes

#### 4 Coverage information (continued)

Please complete in reference to Group Life coverage

Is the member presently insured for Group Life coverage that provides for "Waiver of Premium" while on disability under any Sun Life group contract? ☐ No ☐ Yes If yes, please provide copies of all enrolment cards and/or enrolment forms that the member has signed for all Life benefits.

Contract number

Effective date

Date (dd-mm-yyyy)

Type of Group Life coverage (complete only if enrolment cards and/or enrolment forms are not available)

Type of coverage	Amount of coverage	Date coverage first became effective (dd-mm-yyyy)	Date coverage last increased (If applicable) (dd-mm-yyyy)
Basic employee life	\$		
Basic dependent life	\$		
Basic Employee AD&D	\$		
Basic Dependent AD&D	\$		
Optional employee life	\$		
Optional spousal life	\$		
Optional child life	\$		
Optional employee AD&D	\$		
Optional spousal AD&D	\$		
Optional child AD&D	\$		

#### 5 Earnings and benefit information

If the plan member is tax exempt and the benefit is taxable, please provide a copy of the documentation supporting their tax exempt status.

Current annual insured salary (as of the last day worked) (excluding overtime, commissions and bonuses)		
\$		
Average monthly commissions earned in the last 24 months.	\$	If applicable, please provide a copy of the tax information slips issued for the past two years for this commissioned member.
Total personal income tax exemptions according to the last TDI form (Federal)	Total personal income tax exemptions according to the last TP-1015-3V form (Quebec residents only)	Social Insurance Number
\$	\$	

1. Is the STD plan under which this member is covered taxable? ☐ No ☐ Yes

2. Is the LTD plan under which this member is covered taxable? ☐ No ☐ Yes

If yes, please provide the Social Insurance Number above for the member as it is required for the issuance of the applicable tax information slip(s).

3. Did the member have any scheduled vacation days after the last day worked? ☐ No ☐ Yes

If yes, how many days? \_\_\_\_\_

4. Does the member have unused sick leave? ☐ No ☐ Yes If yes, how many days? \_\_\_\_\_

Date (dd-mm-yyyy)

5. Up to what date was (or will) the member's salary be paid?

6. Does the member currently receive remuneration from you? ☐ No ☐ Yes If yes, answer a) and b) below.

a) How much? \$ \_\_\_\_\_ per month

Does this amount include unused sick leave? ☐ No ☐ Yes

Date (dd-mm-yyyy)

b) Until what date will remuneration continue (including sick leave credits)?

## 5 Earnings and benefit information (continued)

7. According to your records, what is the STD benefit amount?

\$  per week

8. According to your records, what is the LTD benefit amount?

\$  per month

9. To your knowledge, has the member applied for any disability/retirement benefits from CPP, QPP or any other government sponsored plan? ☐ No ☐ Yes

If yes, select benefit type: ☐ Disability ☐ Retirement

10. Does the member belong to a retirement or superannuation plan?

☐ No ☐ Yes If yes, Registration number

11. Is the member eligible for retirement pension? ☐ No ☐ Yes If yes, give details below.

☐ reduced pension

On what date?

Date (dd-mm-yyyy)

Amount

\$

Has the member applied? ☐ No ☐ Yes

☐ unreduced pension

On what date?

Date (dd-mm-yyyy)

Amount

\$

Has the member applied? ☐ No ☐ Yes

☐ medical pension

On what date?

Date (dd-mm-yyyy)

Amount

\$

Has the member applied? ☐ No ☐ Yes

## 6 Workers' Compensation

If the member's illness or injury is work related, have they applied for Workers' Compensation benefits?

☐ No ☐ Yes If yes, please continue.

How much is the benefit per month?

\$

Date (dd-mm-yyyy)

What is the effective / first payment date?

**7 Declaration**

I certify that the statements in this form are true and complete.

Last name of person signing this statement (please print)	First name	Position
Authorized signature <b>X</b>		Date (dd-mm-yyyy)
Telephone number	Fax number	

If you have access to our Group Benefits Absence & Disability web portal, you can submit completed forms electronically through the portal. Alternatively, please fax this form, along with any other information in support of the plan member's claim, to the number that appears below for the Sun Life Group Disability Management Office that manages your claims. Please retain the original copy for your records. You do not need to mail information that you fax. If you are unable to fax this information, you can mail it to the appropriate address.

**Halifax:****Fax: 1-866-639-7850**

PO Box 11480 Stn CV

Montreal QC H3C 5P5

**Montreal:****Fax: 1-866-639-7846**

PO Box 11037 Stn CV

Montreal QC H3C 4W8

**Toronto:****Fax: 1-866-639-7851**

PO Box 950 Stn A

Toronto ON M5W 1G5

**Kitchener - Waterloo:****Fax: 1-866-209-7215**

PO Box 100 Stn C

Kitchener ON N2G 3W9

**Edmonton:****Fax: 1-866-639-7820**

PO Box 2733 Stn Main

Edmonton AB T5J 5C9

**Vancouver:****Fax: 1-866-639-7829**

PO Box 48810 Stn Bentall

Vancouver BC V7X 1A6

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# Disability Job Demands Questionnaire



Sun Life commits to keeping plan members' personal information confidential.

The plan sponsor completes this questionnaire. If the plan member will be absent for 4 weeks or more, send this with the Plan Sponsor's Statement.

The information on this questionnaire is for the assessment of the plan member's absence from work. This questionnaire forms part of the plan member's disability claims file. We will release this questionnaire to the plan member if they request their file.

## 1 Plan member information

Contract number	Sub./Class	Member ID	Division/Billing group number
Last name (Quebec residents – maiden name)		First name	
<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of birth (dd-mm-yyyy)	Company name	
Regular occupation title/Job name			

## 2 Work environment and job activities

The remainder of this form asks for information on the plan member's specific job duties and should be completed by the plan member's immediate supervisor.

Attach extra sheets, if necessary.

If there is a prepared job description, please attach it to this form.

1. Does the plan member's job require work in any of the following conditions:

Outside	<input type="checkbox"/> No	<input type="checkbox"/> Yes	If yes, what percentage of time?	<input type="text"/> %
In extremes of cold or heat	<input type="checkbox"/> No	<input type="checkbox"/> Yes	If yes, what percentage of time?	<input type="text"/> %
In a damp or humid environment	<input type="checkbox"/> No	<input type="checkbox"/> Yes	If yes, what percentage of time?	<input type="text"/> %
In a noisy environment	<input type="checkbox"/> No	<input type="checkbox"/> Yes	If yes, what percentage of time?	<input type="text"/> %
In a dusty or unventilated environment	<input type="checkbox"/> No	<input type="checkbox"/> Yes	If yes, what percentage of time?	<input type="text"/> %
Around toxic fumes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	If yes, what percentage of time?	<input type="text"/> %

2. Does the plan member's job involve handling chemicals? ☐ No ☐ Yes If yes, please list the chemicals below.


3. During the plan member's normal routine, what percentage of time does the job require the member to lift or carry the following weights?

	Never	1 to 25%	25 to 50%	50 to 75%	75 to 100%
More than 50 lbs/22.7 kg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than 20 lbs/9.1 kg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than 10 lbs/4.5 kg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 2 Work environment and job activities (continued)

4. During the plan member's normal routine, what percentage of time does the job involve the following activities?

	Never	1 to 25%	25 to 50%	50 to 75%	75 to 100%
Walking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Daytime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nighttime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reaching:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Above shoulder height	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
At shoulder height	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Below shoulder height	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending or crouching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneeling or crawling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. How much time is the plan member required to maintain the following activities before changing position or activity?

	0 to 30 minutes	30 to 60 minutes	60 to 90 minutes	More than 90 minutes
Sitting at one time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standing at one time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving at one time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. During the average day, what is the number of hours the plan member spends in the following positions or activities?

	0 to 2 hours	2 to 4 hours	4 to 6 hours	6 to 8 hours
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Please list any machines, tools, or other equipment that the plan member uses on the job. You can either list the number of times per day the equipment is used or the percentage of time spent using the equipment, whichever is more applicable.

Type of equipment	Number of times per day OR Percentage of time

8. Cognitive/non-physical aspects of the job

Does the plan member have to answer complaints? ☐ Yes ☐ No

Is the plan member primarily evaluated on production? ☐ Yes ☐ No

Does the plan member work closely with co-workers? ☐ Yes ☐ No

Is the plan member responsible for the performance objectives/decision-making within his/her particular department? ☐ Yes ☐ No

Number of people this plan member supervises:

What percentage of the plan member's time is spent in the following activities?

Talking	Writing	Supervising other people
%	%	%



## 2 Work environment and job activities (continued)

Please list any other relevant aspects of the job that may be considered stressful.


## 3 Additional remarks

Please provide any additional information that may be relevant to this claim which has not been previously provided.


## 4 Declaration

I certify that the statements in this form are true and complete.

Last name of person signing this statement (please print)	First name
Position of person signing this statement (please print)	
Authorized signature X	Date (dd-mm-yyyy)
Telephone number	Fax number

To ensure prompt submission, please fax this form, along with any other information in support of the plan member's claim, to the number that appears below for the Sun Life Group Disability Management Office that manages your claims. Please retain the original copy for your records. You do not need to mail information that you fax. If you are unable to fax this information, you can mail it to the appropriate address.

### Halifax:

Fax: 1-866-639-7850  
PO Box 11480 Stn CV  
Montreal QC H3C 5P5

### Montreal:

Fax: 1-866-639-7846  
PO Box 11037 Stn CV  
Montreal QC H3C 4W8

### Toronto:

Fax: 1-866-639-7851  
PO Box 950 Stn A  
Toronto ON M5W 1G5

### Kitchener - Waterloo:

Fax: 1-866-209-7215  
PO Box 100 Stn C  
Kitchener ON N2G 3W9

### Edmonton:

Fax: 1-866-639-7820  
PO Box 2733 Stn Main  
Edmonton AB T5J 5C9

### Vancouver:

Fax: 1-866-639-7829  
PO Box 48810 Stn Bentall  
Vancouver BC V7X 1A6

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