



## Disability Claim Form Instructions

### Documentation required upon submitting a Disability Claim:

To substantiate a claim for disability benefits covered by the Policy terms, the following documents must be submitted:

- Disability Claim Form;
- An official document proving the date of birth of the Insured Person (i.e. Passport);
- Proof of employment at date of accident, or first manifestation of illness;
- Proof of salary, if benefit is salary related;
- A detailed medical report from the attending physician(s) on the onset, course and consequences of the bodily injury, disease or accident, as the case may be, as well as the degree and probable duration of the disability.

Underwriters may request further documentation at any time and also have the Insured Person examined by its own medical consultants.

During the continuance of a period of disability, updated medical reports from the attending physician(s) may be requested as often as Providers may reasonably require.

Providers will pay the insured benefit as soon as it has satisfied itself of the validity of the claim based on its assessment of the required documents that have been received.

### Claim Form and Documents are accepted via email or fax – hard copy upon request. Submit to:

**Email:** DisabilityClaims@gbg.com  
**Fax:** +1.949.470.2110  
**Mail:** Global Benefits Group  
ATTN: Teri Frank  
27422 Portola Parkway, Suite 110  
Foothill Ranch, CA 92610 USA

## Disability Claim Form

PART A. TO BE COMPLETED BY EMPLOYER OR ORGANIZATION	
<b>A. INSURED INFORMATION</b>	
Name of Insured (Last, First, MI):	
Date of Birth: (DD/MMM/YYYY, i.e., 23/NOV/1988)	Employee # (if applicable):
Passport #:	Passport Country of Issuance:
Address:	
Postal Code:	Country:
Phone:	Fax:
Email:	
Occupation:	
<b>B. EMPLOYER INFORMATION</b>	
Company:	
Address:	
Postal Code:	Country:
Group #:	
Effective Date of Insurance (DD/MMM/YYYY):	
<b>C. CLAIM INFORMATION</b>	
Date last worked (DD/MMM/YYYY):	Date returned to work (DD/MMM/YYYY):
Did Disability occur due to occupational causes?	
Monthly salary (at time of disability):	Percent of premium paid by Employee:
Has employment been terminated? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, date (DD/MMM/YYYY):
If yes, reason:	
<b>D. AUTHORIZATION</b>	
Any person who knowingly files a statement of claim containing any misrepresentation or any false, incomplete or misleading information may be guilty of a criminal act punishable under law and may be subject to civil penalties.	
Signature:	
Name:	
Title:	
Email:	Date (DD/MMM/YYYY):

## Disability Claim Form

<b>PART B. TO BE COMPLETED BY CLAIMANT</b>	
<b>A. INSURED INFORMATION</b>	
Name of Insured (Last, First, MI):	
Date of Birth (DD/MMM/YYYY, i.e., 23/NOV/1988):	
Communications regarding the status of your claim, explanation of benefits and requests for information will be sent to you by email. Please confirm your email address and phone number where you can be best reached.	
Email:	
Phone:	
<b>B. CLAIM INFORMATION</b>	
Date when injury, disability due to sickness or disability due to natural causes first occurred (DD/MMM/YYYY):	
If the disability was caused by an accident, please provide details including date, location and circumstances:	
Has this claim been filed with any other insurance carrier? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please fill in the following:	
Policyholder Name:	
Policyholder Address:	
Postal Code:	Country:
<b>C. AUTHORIZATION</b>	
In connection with this disability claim, I hereby authorize any doctor, past or present, which at any time has attended to me concerning anything which affects my physical or mental health, to release medical information to the underwriters. I agree that a copy of this consent shall have the validity of the original. Any person who knowingly files a statement of claim containing any misrepresentation or any false, incomplete or misleading information may be guilty of a criminal act punishable under law and may be subject to civil penalties.	
Name:	
Signature:	
Date (DD/MMM/YYYY):	

## Disability Claim Form

### PART C. ATTENDING PHYSICIAN'S STATEMENT

#### A. PATIENT INFORMATION

Name of Patient (Last, First, MI):

Date of Birth (DD/MMM/YYYY, i.e., 23/NOV/1988):

Additional details regarding diagnosis and current condition:

Is condition due to injury or sickness arising from Patient's occupation?  Yes  No

Date symptoms first appeared or accident occurred (DD/MMM/YYYY):

Has Patient ever had same or similar condition?  Yes  No If yes, please provide date and details:

If condition is related to pregnancy, please provide estimated delivery date (DD/MMM/YYYY):

Patient was continuously disabled and totally unable to work from (DD/MMM/YYYY): through (DD/MMM/YYYY):

Patient was partially disabled from (DD/MMM/YYYY): through (DD/MMM/YYYY):

If still disabled, Patient should be able to return to work (DD/MMM/YYYY):

Date(s) of Treatment (DD/MMM/YYYY):

Was surgery performed?  Yes  No If yes, please provide date and type of procedure:

Was your Patient confined to a hospital:  Yes  No

If yes, dates of confinement from (DD/MMM/YYYY): through (DD/MMM/YYYY):

Hospital Name:

Address:

Postal Code:

Country:

#### B. PHYSICIAN INFORMATION

Physician Name:

Address:

Phone:

Country:

Fax:

Email:

Physician Signature and Stamp:

Date (DD/MMM/YYYY):



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27422 Portola Parkway, Suite 110  
Foothill Ranch, CA 92610 USA

**Fair Processing Notice**

The GBG Group includes insurance companies, brokering and management companies, as well as assistance and operations companies. We respect your privacy and we are all committed to protecting your personal information.

Our privacy policy tells you about your privacy rights and how the law protects you. This includes information on how we collect and then process your personal information. Our privacy policy is located on our website at <https://www.gbg.com/#/AboutGBG/PrivacyPolicy> and we would advise you to read the policy so you understand your rights and your personal data use by the GBG Group.