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Your disability claims checklist

Filing a disability insurance claim, whether for a planned or unplanned absence from work, can feel overwhelming, especially when you're focused on your health. This simple checklist is designed to help you gather the key information and documents you may need, so the process feels more manageable. A little preparation can go a long way toward helping your claim move forward smoothly.

About you

- ☐ Name
- ☐ Mailing address
- ☐ Phone number
- ☐ Date of birth
- ☐ Social security number

About your job

- ☐ Employer's company name
- ☐ Your insurance company group name
- ☐ Your group disability insurance policy number (request this from your employer)
- ☐ Your employer contact: Name, title and phone number
- ☐ Last day you were able to work
- ☐ Number of hours worked (on last day worked and as scheduled each week)
- ☐ Description of your work duties
- ☐ Date of hire
- ☐ Weekly earnings or salary
- ☐ Other income
- ☐ Indicate whether the injury or illness is work-related
- ☐ The condition that is preventing you from working

About your medical provider(s)

- ☐ Name
- ☐ Specialty
- ☐ Address
- ☐ Phone number
- ☐ Fax number

Other information

You may also be asked to provide this information about your condition:

- ☐ Diagnosis/prognosis
- ☐ Any work duties you are unable to do or should avoid as a result of your injury or illness
- ☐ Activities you can continue at work or at home despite your injury or illness
- ☐ Expected return-to-work date
- ☐ Motivation for returning to work
- ☐ Prior disability
- ☐ Medications/prescriptions
- ☐ Job modification/accomodation

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Your employer will provide

- ✓ Confirmation of your name, address, phone number and Social Security Number
- ✓ Last day of work, date of hire, effective date of coverage, earnings, number of hours you worked each week
- ✓ Nature of your disability
- ✓ Job description and duties
- ✓ Information about your pay and your last working day
- ✓ Status of your employment when you were disabled
- ✓ Possibility of job modification or accommodation
- ✓ Other income being received
- ✓ Work-related disability

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Notes

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