

Group Disability Claim Filing Instructions

(Not for use when filing for Physician's Expense Benefits)

Disability Claim form is to be completed after you become disabled.

1. Complete Employee's Disability Benefits Application in full.
2. Have the treating physician complete the Attending Physician's Statement and return to you.
3. Have your Employer complete the Employer's Report of Claim.
4. Submit the completed:
 - A. Employee's Disability Benefits Application
 - B. Employer's Report of Claim
 - C. Attending Physician's Statementto the address below or submit via our toll-free fax @ 1-800-818-3453
5. Please complete if you desire benefits deposited directly into your bank account.

I authorize AFAC to initiate credit entries to my account at the depository named below. This authorization is to remain in force and effect until AFAC receives written notification from me of its termination in such time and in such manner as to afford AFAC and the Depository opportunity to act on it.

Signature: _____

NOTE: You must attach a voided check to begin direct deposit.

All portions of this form package must be completed to avoid undue delay in processing claimant's request for benefits. If you have any questions regarding completion of this form please call:

Toll Free Phone # 1-800-662-1113

Local Phone # 405-523-5025

 **American Fidelity
Assurance Company**

A member of the American Fidelity Group®

Educational Services Division
Benefits Department
P.O. Box 25160
Oklahoma City, Oklahoma 73125-0160
www.afadvantage.com



A member of the American Fidelity Group®

American Fidelity Assurance Company
Mail to: AFES Benefits Department
 P.O. Box 25160
 Oklahoma City, OK 73125-0160
Local Phone # (405) 523-5025
Toll Free Phone # 1-800-662-1113
Toll Free Fax # 1-800-818-3453
www.afadvantage.com

EMPLOYER'S REPORT OF CLAIM

E M P L O Y E E M E N T	Name of Employer:	Phone No.: ()
	Mailing Address: (include street, city, state and zip code)	Fax No.: ()
	Name of Employee:	Social Security Number: - -
	Address: (include street, city, state and zip code)	Phone No.: ()
	Date of Hire: Effective date of employee's coverage:	Occupation: (please attach job description)
	Status of employment at time of disability: <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Leave of Absence <input type="checkbox"/> Terminated <input type="checkbox"/> Retired	
	Number of hours worked per week at time of disability: _____ Number of contract days: _____ for _____ school year. Has employee's status of employment changed? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, current status and date of status-change? _____ In-house days: First Day _____ Last Day _____	
P R E M I U M S	Does employee participate in Social Security? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, hired after 4/1/86? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	Please furnish the percentage of the employee's AFA disability premium you pay:	Short Term _____%
	Are the AFA disability premiums withheld before or after taxes? Short Term Plan <input type="checkbox"/> Before <input type="checkbox"/> After Long Term Plan <input type="checkbox"/> Before <input type="checkbox"/> After	Long Term _____%
S A L A R Y	CONTRACTED SALARY AT TIME OF DISABILITY	
	Annual: \$ _____ Effective Date: _____	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 12 Month Work Schedule <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 12 Month Pay Schedule
D I S A B I L I T Y	Date employee last worked: _____	Have AFA Disability premiums been withheld
	Has employee returned to work? <input type="checkbox"/> Yes <input type="checkbox"/> No	through the last date worked? <input type="checkbox"/> Yes <input type="checkbox"/> No
	If Yes, date returned to work: Full Time: _____ Part Time: _____	If not, what is the last date disability premiums were deducted? _____
O T H E R I N C O M E	Did Employee's disability result from employment? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If yes, name, address and phone number of Worker's Compensation carrier: _____	
	Has employee made a claim for or is entitled to Worker's Compensation? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If yes, weekly rate of compensation: \$ _____	
	Provide: The final date the employee is entitled to fully paid sick leave _____ The first date the employee is entitled to differential/sabbatical pay, if any _____ The last date the employee is entitled to differential/sabbatical pay _____ The daily rate of differential/sabbatical pay \$ _____	
Name, address and phone number of any other disability carrier: (include street, city, state and zip code)		
Is employee eligible for disability retirement benefits? <input type="checkbox"/> Yes <input type="checkbox"/> No		

Remember - To attach a copy of the applicable school calendar for any contracted employee.

FAILURE TO DO SO COULD RESULT IN DELAYED BENEFITS

I hereby certify that the above named employee is a member of our Group Disability Program. The Information stated above is correct to the best of my knowledge and belief.

Authorized signature of employer firm or authorized official: _____

Title: _____ Date: _____

E-mail Address: _____



A member of the American Fidelity Group®

Mail to: AFES Benefits Department
P.O. Box 25160
Oklahoma City, OK 73125-0160
Local Phone # (405) 523-5025
Toll Free Phone # 1-800-662-1113
Toll Free Fax # 1-800-818-3453
www.afadvantage.com

EMPLOYEE'S DISABILITY BENEFITS APPLICATION

WARNING: Any person who knowingly, and with intent to injure, defraud or deceive any insurer files a statement of claim containing any false, incomplete, or misleading information may be guilty of insurance fraud and subject to criminal and civil penalties.

Form with fields for: Full Name, Maiden Name, Account Number, Residence, Social Security Number, Mailing Address, Date of Birth, Telephone Number, Marital Status, Occupation, Employment Termination, Names & birth dates of spouse & dependents, Date accident or illness began, Nature of illness or injury, Dates of medical treatment, Hospitalization details, Treating physicians, Disability related to employment, Dates of total disability, Federal Taxes, Other income sources, Signature, and Date.

AUTHORIZATION TO DISCLOSE PROTECTED HEALTH INFORMATION

I hereby authorize the entities specified below to disclose any information about my entire medical record or benefits payable for this disability and history of treatment for physical and/or emotional illness to include psychological testing, except psychotherapy notes, to individuals representing American Fidelity Assurance Company (AFAC) who are involved in determining whether I am eligible for benefits under my insurance coverage.

NOTICE: Information authorized for release may include information on communicable or venereal diseases such as hepatitis, syphilis, gonorrhea, HIV/AIDS (Human Immunodeficiency Virus/Acquired Immune Deficiency Syndrome) or other conditions for which you may have been treated. This authorization excludes disclosure of the result of a test for HIV if you have tested HIV positive but have not developed symptoms of the disease AIDS.

I understand that I may refuse to sign this authorization; however, if I do not sign the authorization, my failure to sign the authorization may result in a denial or a delay of benefits.

I understand that I may revoke this authorization at any time by writing to AFES Benefits Department, PO Box 25160, Oklahoma City, OK 73125-0160 or by calling, toll-free, 1-800-662-1113.

I understand that my right to revoke this authorization is limited to the extent that: AFAC has taken action in reliance on the authorization; or, the law provides AFAC with the right to contest my insurance coverage or a claim under my insurance coverage. A copy of this authorization will be as valid as the original.

I understand that if protected health information is disclosed to a person or organization that is not required to comply with federal privacy regulations, the information may be redisclosed and no longer protected by the federal privacy regulations.

For health insurance coverage this authorization will expire twenty-four months from the date it is signed or upon termination of my insurance policy, whichever occurs first. For insurance coverage other than health insurance, this authorization will expire twenty-four months from the date it is signed or upon expiration of my claim for benefits, whichever occurs first.

Signature (Patient) or Personal Representative (if applicable) Printed Name (Patient)

Relationship of Personal Representative to Patient Date

If authorization is supplied by a personal representative a description of the authority to act on behalf of the Insured must be included.

Please retain a copy for your personal records, or you may request a copy from our company.



A member of the American Fidelity Group®

American Fidelity Assurance Company
Mail to: AFES Benefits Department
 P.O. Box 25160
 Oklahoma City, OK 73125-0160
Local Phone # (405) 523-5025
Toll Free Phone # 1-800-662-1113
Toll Free Fax # 1-800-818-3453

ATTENDING PHYSICIAN'S STATEMENT

Warning: Any person who knowingly, and with intent to injure, defraud, or deceive any insurer files a statement of claim containing any false, incomplete, or misleading information may be guilty of insurance fraud and subject to criminal and civil penalties.

Name of Patient:		Date of Birth:	Account Number:
D I A G N O S I S	Diagnosis: (including complications)		ICDA Code:
	Is disability due to injury or sickness arising out of or in the course of patient's employment? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	Is disability the result of pregnancy? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, type of delivery: _____ Date pregnancy was diagnosed? ___/___/___ Date of delivery:(if delivered) ___/___/___ Expected date of delivery? ___/___/___		
H I S T O R Y	When did symptoms first appear or accident happen? _____ Date patient first consulted you for this condition? _____ ___/___/___ ___/___/___		
	Has the patient ever had the same or similar condition? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, indicate when and describe:		
	Was the patient referred to you? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, full name and address of referring physician:		
T R E A T M E N T	Frequency of treatment: <input type="checkbox"/> Monthly <input type="checkbox"/> Weekly <input type="checkbox"/> Other Date of next appointment : ___/___/___		
	Nature of treatment being rendered (including surgery and any medications being prescribed)		
	List all dates of treatment or medical attention since the disability began:		
	Is patient still under your regular care for this condition? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, please explain and provide name of the current treating physician:		
	Has the patient been confined to a hospital? <input type="checkbox"/> Yes <input type="checkbox"/> No Admitted: ___/___/___ Discharged: ___/___/___ If yes, give admit and discharge dates along with name and address of hospital. Admitted: ___/___/___ Discharged: ___/___/___ Name: _____ Address: _____		
P R O G N O S I S	Dates of total disability: (unable to work) From: _____ Through: _____ Disabled from: Patient's Job <input type="checkbox"/> Yes <input type="checkbox"/> No Any other work <input type="checkbox"/> Yes <input type="checkbox"/> No		
	Dates of partial disability? From: _____ Through: _____		
	If the patient is currently disabled, what is the anticipated length of disability? <input type="checkbox"/> 1-2 Months <input type="checkbox"/> 2-3 Months <input type="checkbox"/> 3-6 Months <input type="checkbox"/> 6-12 Months <input type="checkbox"/> More than 12 Months <input type="checkbox"/> Permanent		
	When, in your opinion, will the patient recover sufficiently to return to work?		
I M P A I R M E N T S	Functional Limitations that render your patient totally disabled:		
	Current Treatment Plan: Attention Physician: This form documents your verification that the above named individual is totally disabled from either their occupation or any other occupation. Your signature generates disbursement of disability benefits. You will be asked periodically for updates related to this individual's disability status and treatment plan.		
Attending Physician's Name: (print)		Specialty:	Telephone #: () - () - Fax #: () - () -
Street Address:		City:	State: Zip Code:
Signature:		Federal Tax ID #:	Date:
Email address:			