TheStandard®

Standard Insurance Company
Employee Benefits Department 800.368.1135 Tel 971.321.7088 Fax
PO Box 2800 Portland OR 97208

MoDOT & Patrol Employees' Retirement System
MPERS – Disability Benefits
Claim Packet Instructions

PLEASE READ CAREFULLY

Your application for benefits consists of four forms. **Every space on these forms should be filled in** to avoid delay in processing your application. If a section does not apply, or information is not available, **"NA"** should be written in the space so that we know you did not overlook that particular question. **If a form is received incomplete, it may be returned for completion.**

The four forms are:

1. **The Employee's Statement**

   - Answer every question completely. Be sure to use the appropriate section for injury, sickness or pregnancy. If a question does not apply to you, write "NA".
   - Use an additional page, if necessary, to give full and complete answers.
   - Attach copies of any Social Security, Workers' Compensation or other benefit/awards determinations you have received. If you have applied for any other benefits but have not yet received them, please send a copy of the confirmation acknowledging that you applied. This information is needed to accurately calculate your monthly benefits. If you are unable to make copies of these documents, please send the originals. We will photocopy and return them to you promptly.
   - Remember to sign and date your statement. **An unsigned or undated statement will be returned to you.**

2. **The Authorization to Obtain and Release Information**
   The Authorization to Obtain and Release Psychotherapy Notes

   - Please sign and date the Authorization to Obtain and Release Information and attach it to the Employee's Statement. Your signature lets The Standard get the information about you that we need to determine your eligibility for benefits. The Authorization to Obtain and Release Information also lets The Standard release this information to specific persons.

     If you have seen or been treated by a Psychiatrist, Psychotherapist, Psychologist, Clinical Social Worker (MSW, MCSW, etc.), or any other provider of treatment for a mental condition, please sign and return the Authorization to Obtain and Release Information ***and*** the Authorization to Obtain and Release Psychotherapy Notes.

     You will receive copies of these Authorizations upon your request.

3. **The Attending Physician's Statement**

   - **Part A** should be completed by you.
   - **Part B** should be completed by your physician. **If you have seen more than one physician for your disability, a statement should be completed by each physician.** (You may request additional forms from your employer.) Your physician(s) should mail the completed form directly to The Standard.

4. **The Employer's Statement**

   - This form should be completed by your employer, who will mail it to The Standard.

You are responsible for making sure all required forms are completed and returned to our office. For questions regarding your claim, please contact our office at (800) 368-1135.

Reset

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MoDOT & Patrol Employees' Retirement System
MPERS – Disability Benefits
Employee's Statement

Please type or print. Form may be returned for unanswered questions.

I am applying for: ☐ Long Term Disability ☐ Work Related Disability

1. CLAIMANT

Full Name: _____ Social Security No.: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Home Phone No.: (_____) _____

Birthdate: _____ Sex: ☐ Male ☐ Female Height: _____ Weight: _____

Name of Spouse: _____

2. EMPLOYMENT

Name of Employer: _____ Group Policy No.: 643110

Address: _____ City: _____ State: _____ Zip Code: _____

Phone No.: (_____) _____

State your job title and describe your duties at work.

Is your disability work-related? ☐ Yes ☐ No Date of injury: _____

Have you filed a Workers' Compensation claim? ☐ Yes ☐ No If Yes, W.C. claim # _____

Last full day at work: _____

Date you became unable to work at your occupation as a result of disability: _____

Are you now or have you worked at your occupation or any other occupation since the date of your injury? ☐ Yes ☐ No

If yes, list names of employers, addresses, telephone numbers, and dates of employment.

Are you self-employed at any activity? ☐ Yes ☐ No

Date you resumed part-time work: _____ Work Phone: (_____) _____ Extension: _____

Date you resumed full-time work: _____ Work Phone: (_____) _____ Extension: _____

3. SICKNESS *Please list all sickness which contribute to your being unable to work at your occupation. Use additional page, if necessary, to give full and complete answers.*

Sickness: _____ Date First Noticed _____

_____ Date First Noticed _____

State what you believe caused your sickness.

Describe your symptoms: _____

Have you ever had the same condition or a related sickness before? ☐ Yes ☐ No Date _____

4. INJURY

Describe Injuries: ____________________

Cause of Injuries: ____________________

Time, Date and Location of Injuries.

5. PREGNANCY

Date you expect to cease work: ____________________ Expected delivery date: ____________________

Actual delivery date: ____________________ Expected return to work date: ____________________

Please indicate any foreseeable complications.

6. ATTENDING PHYSICIAN *List all physicians consulted for this injury, sickness or pregnancy. Use separate sheet, if needed.*

Physician's Name: ____________________ Specialty: ____________________ Phone No.: (_____) ____________________

Street Address: ____________________ Fax No.: (_____) ____________________

City: ____________________ State: __________ Zip Code: ____________________

Date first consulted for this injury or sickness: ____________________ Date last consulted: ____________________

Physician's Name: ____________________ Specialty: ____________________ Phone No.: (_____) ____________________

Street Address: ____________________ Fax No.: (_____) ____________________

City: ____________________ State: __________ Zip Code: ____________________

Date first consulted for this injury or sickness: ____________________ Date last consulted: ____________________

Physician's Name: ____________________ Specialty: ____________________ Phone No.: (_____) ____________________

Street Address: ____________________ Fax No.: (_____) ____________________

City: ____________________ State: __________ Zip Code: ____________________

Date first consulted for this injury or sickness: ____________________ Date last consulted: ____________________

Note: Please complete Part A on page 9 of the Attending Physician's Statement.

7. HOSPITAL *If you were hospitalized for this condition, please complete. Please attach copy of hospital bill if available.*

Hospital Name: ____________________ Address: ____________________

From: __________ through: __________ Reason for hospitalization: ____________________

From: __________ through: __________ Reason for hospitalization: ____________________

8. HISTORY *List all sickness or injuries for which you have received treatment over the past five years. Use separate sheet if needed.*

Ailment	Date	Physician's Name	Complete Address

9. DEDUCTIBLE INCOME

Have you applied for or are you receiving benefits from:	Applied Yes	Applied No	Receiving Yes	Receiving No	Date Applied For	Amount Received Weekly	Amount Received Monthly	Effective Date
a. Social Security	☐	☐	☐	☐				
b. Workers' Compensation	☐	☐	☐	☐				
c. Share Leave	☐	☐	☐	☐				
d. Other _____ (e.g., unemployment or union benefits, etc.)	☐	☐	☐	☐				

Please send copies of any letters or notices approving or denying benefits.

10. VOCATIONAL *Complete the following and/or attach a resume.*

Education level	Yes	No	If no, last grade attended.	
Grade School Graduate	☐	☐		
High School Graduate	☐	☐		
GED	☐	☐		
College Graduate	☐	☐	Degree	Major
Post Graduate	☐	☐	Degree	Major

Have you attended any trade schools or received other special training? ☐ Yes ☐ No
If yes, please describe.

Work Experience: *Complete the following starting with your most recent work experience.*

Job Title & Employer	Dates of Employment	Duties	Last Salary
1.	From: To:		
2.	From: To:		
3.	From: To:		
4.	From: To:		
5.	From: To:		

Acknowledgement

I hereby certify that the answers I have made to the foregoing questions are both complete and true to the best of my knowledge and belief. Some states require us to inform you that any person who, knowingly and with intent to injure, defraud or deceive an insurance company, or other person, files a statement containing false or misleading information concerning any fact material hereto commits a fraudulent insurance act which is subject to civil and/or criminal penalties, depending upon the state. Such actions may be deemed a felony and substantial fines may be imposed.

SIGNATURE _____ DATE _____

Authorization to Obtain and Release Information

I AUTHORIZE THESE PERSONS having any records or knowledge of me or my health:

- Any physician, medical practitioner or health care provider.
- Any hospital, clinic, pharmacy or other medical or medically related facility or association.
- Kaiser Permanente.
- Any insurance company or annuity company.
- Any employer, policyholder or plan sponsor.
- Any organization or entity administering a benefit or leave program (including statutory benefits) or an annuity program.
- Any educational, vocational or rehabilitation counselor, organization or program.
- Any consumer reporting agency, financial institution, accountant, or tax preparer.
- Any government agency *(for example, Social Security Administration, Public Retirement System, Railroad Retirement Board, Workers' Compensation Board, etc.).*

TO GIVE THIS INFORMATION:

- Charts, notes, x-rays, operative reports, lab and medication records and all other medical information about me, including medical history, diagnosis, testing and test results. Prognosis and treatment of any physical or mental condition, including:
  - Any disorder of the immune system, including HIV, Acquired Immune Deficiency Syndrome (AIDS) or other related syndromes or complexes.
  - Any communicable disease or disorder.
  - Any psychiatric or psychological condition, including test results, but excluding psychotherapy notes. Psychotherapy notes do not include a summary of diagnosis, functional status, the treatment plan, symptoms, prognosis and progress to date.
  - Any condition, treatment, or therapy related to substance abuse, including alcohol and drugs.

and:

- Any non-medical information requested about me, including such things as education, employment history, earnings or finances, return to work accommodation discussions or evaluations and eligibility for other benefits or leave periods including but not limited to claims status, benefit amount, payments, settlement terms, effective and termination dates, plan or program contributions, etc.

TO STANDARD INSURANCE COMPANY, THE STANDARD LIFE INSURANCE COMPANY OF NEW YORK, THE STANDARD BENEFIT ADMINISTRATORS AND THEIR AUTHORIZED REPRESENTATIVES (referred to as "The Companies", individually and collectively), AND MY EMPLOYER'S ABSENCE MANAGEMENT PROGRAM ADMINISTRATOR ("Absence Manager").

- I acknowledge that any agreements I have made to restrict my protected health information do not apply to this authorization and I instruct the persons and organizations identified above to release and disclose my entire medical record without restriction.
- I understand that each of The Companies and Absence Manager will gather my information only if they are administering or deciding a claim(s) under my life, dismemberment and/or disability insurance, or leave of absence claim, and will use the information to determine my eligibility or entitlement for benefits or leave of absence.
- I understand that I have the right to refuse to sign this authorization and a right to revoke this authorization at any time by sending a written statement to The Companies and Absence Manager, except to the extent the authorization has been relied upon to disclose requested records. A revocation of the authorization, or the failure to sign the authorization, may impair The Companies' and Absence Manager's ability to evaluate or process my claim(s), and may be a basis for denying or closing my claim(s) for benefits or leave of absence.
- I understand that in the course of conducting its business The Companies and Absence Manager may disclose to other parties information about me. They may release information to a reinsurer, a plan administrator, plan sponsor, or any person performing business or legal services for them in connection with my claim(s). I understand that The Companies and Absence Manager will release information to my employer necessary for absence management, for return to work and accommodation discussions, and when performing administration of my employer's self-funded (and not insured) disability plans.
- I understand that The Companies and Absence Manager comply with state and federal laws and regulations enacted to protect my privacy. I also understand that the information disclosed to them pursuant to this authorization may be subject to redisclosure with my authorization or as otherwise permitted or required by law. Information retained and disclosed by The Companies and Absence Manager may not be protected under the Health Insurance Portability and Accountability Act [HIPAA].
- I understand and agree that this authorization as used to gather information shall remain in force from the date signed below:
  - For Standard Insurance Company, the duration of my claim(s) or 24 months, whichever occurs first.
  - For The Standard Life Insurance Company of New York, the duration of my claim(s) or 24 months, whichever occurs first.
  - For The Standard Benefit Administrators, the duration of my claim(s) administered by The Standard Benefit Administrators or 24 months, whichever occurs first.
  - For Absence Manager, 24 months.
- I understand and agree that The Companies and Absence Manager may share information with each other regarding my life, dismemberment and/or disability insurance claim(s) and leave of absence claim. This authorization to share information shall remain valid for 12 months from the date signed below.
- I acknowledge that I have read this authorization and the New Mexico notice on page 6. A photocopy or facsimile of this authorization is as valid as the original and will be provided to me upon request.

Name (please print) _____ Social Security No. _____

Signature of Claimant/Representative _____ Date _____

If signature is provided by legal representative (e.g., Attorney in Fact, guardian or conservator), please attach documentation of legal status.

Standard Insurance Company is a licensed insurance company in all states except New York. The Standard Life Insurance Company of New York is an insurance company licensed only in New York. An absence manager may be hired by your employer and may be one of The Companies.

FOR RESIDENTS OF NEW MEXICO

The state of New Mexico requires Standard Insurance Company to provide you with the following information pursuant to its Domestic Abuse Insurance Protection Act.

The Authorization form allows Standard Insurance Company to obtain personal information as it determines your eligibility for insurance benefits. The information obtained from you and from other sources may include confidential abuse information. "Confidential abuse information" means information about acts of domestic abuse or abuse status, the work or home address or telephone number of a victim of domestic abuse or the status of an applicant or insured as a family member, employer or associate of a victim of domestic abuse or a person with whom an applicant or insured is known to have a direct, close personal, family or abuse-related counseling relationship. With respect to confidential abuse information, you may revoke this authorization in writing, effective ten days after receipt by Standard Insurance Company, understanding that doing so may result in a claim being denied or may adversely affect a pending insurance action.

Standard Insurance Company is prohibited by law from using abuse status as a basis for denying, refusing to issue, renew or reissue or canceling or otherwise terminating a policy, restricting or excluding coverage or benefits of a policy or charging a higher premium for a policy.

Upon written request you have the right to review your confidential abuse information obtained by Standard Insurance Company. Within 30 business days of receiving the request, Standard Insurance Company will mail you a copy of the information pertaining to you. After you have reviewed the information, you may request that we correct, amend or delete any confidential abuse information which you believe is incorrect. Standard Insurance Company will carefully review your request and make changes when justified. If you would like more information about this right or our information practices, a full notice can be obtained by writing to us.

If you wish to be a protected person (a victim of domestic abuse who has notified Standard Insurance Company that you are or have been a victim of domestic abuse) and participate in Standard Insurance Company's location information confidentiality program, your request should be sent to Standard Insurance Company.

Authorization to Obtain and Release Psychotherapy Notes

I AUTHORIZE THESE PERSONS having any records or knowledge of me or my health:

- Any physician, medical practitioner or health care provider.
- Any hospital, clinic, pharmacy or other medical or medically related facility or association.
- Kaiser Permanente.
- Any insurance company.
- Any organization or entity administering a benefit or leave program (including statutory benefits)
- Any government agency (*for example, Social Security Administration, Public Retirement System, Railroad Retirement Board, Workers' Compensation Board, etc.).*

TO GIVE THIS INFORMATION:

- Notes recorded by a health care provider who is a mental health professional documenting or analyzing the contents of conversation(s) during a private counseling session or a group, joint, or family counseling session and that are separated from the rest of my medical record.

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- I acknowledge that any agreements I have made to restrict my protected health information do not apply to this authorization and I instruct the persons and organizations identified above to release and disclose my entire medical record without restriction.
- I understand that each of The Companies and Absence Manager will gather my information only if they are administering or deciding my disability or leave of absence claim(s), and will use the information to determine my eligibility or entitlement for benefits or leave of absence.
- I understand that I have the right to refuse to sign this authorization and a right to revoke this authorization at any time by sending a written statement to The Companies and Absence Manager, except to the extent the authorization has been relied upon to disclose requested records. A revocation of the authorization, or the failure to sign the authorization, may impair The Companies and Absence Manager's ability to evaluate or process my claim(s), and may be a basis for denying or closing my claim(s) for benefits or leave of absence.
- I understand that in the course of conducting its business The Companies and Absence Manager may disclose to other parties information about me. They may release information to a reinsurer, a plan administrator, plan sponsor, or any person performing business or legal services for them in connection with my claim(s). I understand that The Companies and Absence Manager will release information to my employer necessary for absence management, for return to work and accommodation discussions, and when performing administration of my employer's self-funded (and not insured) disability plans.
- I understand that The Companies and Absence Manager comply with state and federal laws and regulations enacted to protect my privacy. I also understand that the information disclosed to them pursuant to this authorization may be subject to redisclosure with my authorization or as otherwise permitted or required by law. Information retained and disclosed by The Companies and Absence Manager may not be protected under the Health Insurance Portability and Accountability Act [HIPAA].
- I understand and agree that this authorization as used to gather information shall remain in force from the date signed below:
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  - For The Standard Benefit Administrators, the duration of my claim(s) administered by The Standard Benefit Administrators or 24 months, whichever occurs first.
  - For Absence Manager, 24 months.
- I understand and agree that The Companies and Absence Manager may share information with each other regarding my disability and leave of absence claim(s). This authorization to share information shall remain valid for 12 months from the date signed below.
- I acknowledge that I have read this authorization and the New Mexico notice on page 8. A photocopy or facsimile of this authorization is as valid as the original and will be provided to me upon request.

Name (please print)_____ Social Security No._____

Signature of Claimant/Representative _____ Date _____

If signature is provided by legal representative (e.g., Attorney in Fact, guardian or conservator), please attach documentation of legal status.

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Standard Insurance Company is prohibited by law from using abuse status as a basis for denying, refusing to issue, renew or reissue or canceling or otherwise terminating a policy, restricting or excluding coverage or benefits of a policy or charging a higher premium for a policy.

Upon written request you have the right to review your confidential abuse information obtained by Standard Insurance Company. Within 30 business days of receiving the request, Standard Insurance Company will mail you a copy of the information pertaining to you. After you have reviewed the information, you may request that we correct, amend or delete any confidential abuse information which you believe is incorrect. Standard Insurance Company will carefully review your request and make changes when justified. If you would like more information about this right or our information practices, a full notice can be obtained by writing to us.

If you wish to be a protected person (a victim of domestic abuse who has notified Standard Insurance Company that you are or have been a victim of domestic abuse) and participate in Standard Insurance Company's location information confidentiality program, your request should be sent to Standard Insurance Company.

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MoDOT & Patrol Employees' Retirement System
MPERS – Disability Benefits
Attending Physician's Statement

PART A. TO BE COMPLETED BY CLAIMANT

Full Name: _____ Social Security No.: _____

Other Names Used: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Home Phone No.: (_____) _____ Birthdate: _____

Occupation: _____ Employer: _____ Group Policy No.: **643110**

I returned to work: Date _____ I expect to return to work: Date _____

PART B. TO BE COMPLETED BY PHYSICIAN

DEAR DOCTOR: The purpose of this form is to help us determine whether the clinical condition of your patient is disabling. We need documentation of functional impairment. Please include laboratory data and results of special tests (X-rays, CAT scan, EKG, etc.). Please attach copies of any pertinent surgical reports, hospital admitting history, physician discharge summaries, chart notes, and narrative reports.

The patient is responsible for the completion of this form without expense to The Standard. Forms may be returned for unanswered questions.

1. INFORMATION

Primary Diagnosis: ICD Code (_____) _____

Secondary Diagnosis: ICD Code (_____) _____

Other diagnoses and ICD Codes related to this claim.

Symptoms.

Patient's Height: _____ Weight: _____ BP _____ (Right arm) BP _____ (Left arm) Pulse _____ (Radial)

Patient's No.: _____

Is condition primarily related to:

a. Patient's Employment ☐ Yes ☐ No
b. Mental Disorder ☐ Yes ☐ No
c. Alcohol or Drug Condition ☐ Yes ☐ No
d. Pregnancy ☐ Yes ☐ No

Dominant Hand ☐ Left ☐ Right

Expected Delivery Date: _____

Para: _____ Gravida: _____

Actual Delivery Date: _____

Complications: _____

☐ Vaginal ☐ Caesarean Section

2. HISTORY

If patient was referred to you, indicate by whom: _____

Has patient ever had same or similar condition? ☐ Yes ☐ No

If yes, indicate when: _____ Describe: _____

Do, or have, other conditions contributed to this condition? ☐ Yes ☐ No

If yes, please explain: _____

Date patient first consulted you for **this** condition: _____ For **any** condition: _____

Dates of subsequent treatment: _____

Date of most recent visit: _____

If patient was hospitalized, please provide dates. Admitted: _____ Discharged: _____

Admitting Diagnosis: _____ Discharge Diagnosis: _____

Name of Hospital: _____

Address: _____ City: _____ State: _____ Zip Code: _____

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Claimant's Name: _____

3. ASSESSMENT

Date you recommended patient should stop working: _____ Why? _____

Describe the patient's physical, mental and cognitive limitations and work activity limitations: _____

How long from today's date will the described limitations impair the patient? _____

Is the patient competent to manage insurance benefits? ☐ Yes ☐ No

If no, is the patient competent to appoint someone to help manage the insurance benefits? ☐ Yes ☐ No

4. TREATMENT

Planned course of treatment. (Please include expected duration, surgeries, therapy, etc.) _____

Medications prescribed: dosage, frequency and date of prescription(s). _____

List other treating or referring physicians. (Continue on separate page, if necessary.)

NAME	ADDRESS		
1.			
Phone No. ( )	City	State	Zip Code
2.			
Phone No. ( )	City	State	Zip Code

What reasonable work or job site modifications could the employer make to assist the individual to return to work? Please specify: _____

Assessment and treatment are complicated by:

☐ Malingering
☐ Significant emotional or behavioral disorder such as: ☐ Depression ☐ Anxiety ☐ Hysteria (Check pertinent areas.)
☐ Exaggeration, inconsistent findings, subjective complaints out of proportion to objective findings, bizarre or contradictory observations.
☐ Dependence on drugs/medication. Specify: _____
☐ Other (please describe): _____

5. PROGNOSIS

Describe patient's condition since onset of symptoms: ☐ Recovered ☐ Improved ☐ Unchanged ☐ Regressed

When do you expect a fundamental or marked change in patient's condition? ☐ Never ☐ Condition expected to regress ☐ Condition expected to improve

State anticipated date: _____ or, Unable to determine, follow up in: _____ months

When do you anticipate the patient can return to work? State anticipated date: _____ or, Unable to determine, because of: _____

_____ follow up in: _____ months

Remarks: _____

Acknowledgement

I hereby certify that the answers I have made to the foregoing questions are both complete and true to the best of my knowledge and belief. Some states require us to inform you that any person who, knowingly and with intent to injure, defraud or deceive an insurance company, or other person, files a statement containing false or misleading information concerning any fact material hereto commits a fraudulent insurance act which is subject to civil and/or criminal penalties, depending upon the state. Such actions may be deemed a felony and substantial fines may be imposed.

Physician's Signature _____ Date _____

Physician's Name (Please Print) _____ Specialty _____

Address _____ City _____ State _____ Zip Code _____

Physician's Taxpayer ID No. _____ Phone No. (_____) _____ Fax No. (_____) _____

Return to Standard Insurance Company at the address above.

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MoDOT & Patrol Employees' Retirement System
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Employer's Statement

1. EMPLOYEE

Name of Employee: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Job Title: _____

Phone No.: (_____) _____ Date Employed: _____

2. INFORMATION

Date employee's coverage became effective: _____

Work Location: Address: _____ State: _____ Zip Code: _____

Was employee given a Disability Handbook (Certificate of Insurance)? ☐ Yes ☐ No ☐ Don't know

Employee's Medical Insurance carrier: _____

Phone No.: (_____) _____ Effective date for medical insurance: _____

Employee's status on date disability commenced:
Actively at Work? ☐ Yes ☐ No If no, reason: _____ Number of hours worked per week: _____

Last day of work before disability commenced _____ : _____

Number of hours worked this day: _____ Date employee returned to work after disability ended _____

Is disability caused or contributed to by employment? ☐ Yes ☐ No ☐ Undetermined

Has employee filed a Workers' Compensation claim? ☐ Yes ☐ No ☐ Don't know

Workers' Compensation Carrier Name: _____ Claim #: _____ Date of Injury: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Phone No.: (_____) _____ Person to contact: _____

Is employment now terminated? ☐ Yes ☐ No Reason _____

Is employment scheduled for termination? ☐ Yes ☐ No Date of termination _____

Reason: _____

3. SALARY AT TIME OF DISABILITY *Please check only one box.*

☐ Base Monthly Earnings Monthly rate $ _____ ☐ Base Weekly Earnings Weekly rate $ _____

☐ Base Yearly Earnings Annual rate $ _____ ☐ Base Hourly Earnings Hourly rate $ _____

☐ Shift Differential ☐ Cooperative Education Training Program (co-op)

Date of last increase: _____ Earnings prior to increase: $ _____ per _____ Effective date: _____

4. COMPENSATION FOR PERIOD AFTER DISABILITY

Type	Last date through which paid or payable	Amount / Rate
Sick Pay		
Vacation Pay		
Wages/Salary, *earned after* disability		

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MPERS – Disability Benefits
Employer's Statement

5. DEDUCTIBLE INCOME

Is employee covered by or now receiving benefits from the following?	Covered Yes	Covered No	Receiving Yes	Receiving No	Receiving Don't Know	Date of Application	Amount Weekly	Amount Monthly	Effective Date
a. Social Security	☑	☐	☐	☐	☐				
b. Workers' Compensation	☑	☐	☐	☐	☐				
c. Share Leave	☑	☐	☐	☐	☐				
d. Other _____ (e.g., unemployment or union benefits, etc.)	☐	☐	☐	☐	☐				

6. TAX INFORMATION

Employer's Federal Tax I.D. Number: _____

Is this employee subject to: Social Security taxes? ☑ Yes ☐ No Medicare taxes? ☑ Yes ☐ No

If subject to Social Security taxes, what are the employee's year to date Social Security wages? _____

7. ATTACHMENTS

Please attach copies of the following.

Employment Application or Resume

8. EMPLOYER REPRESENTATIVE COMPLETING THIS FORM

Employer: _____ Phone No.: _____ Fund Number: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Acknowledgement

I hereby certify that the answers I have made to the foregoing questions are both complete and true to the best of my knowledge and belief. Some states require us to inform you that any person who, knowingly and with intent to injure, defraud or deceive an insurance company, or other person, files a statement containing false or misleading information concerning any fact material hereto commits a fraudulent insurance act which is subject to civil and/or criminal penalties, depending upon the state. Such actions may be deemed a felony and substantial fines may be imposed.

Signature: _____ Date: _____

Prepared by: _____ Title: _____

Phone No.: (_____) _____ Fax No.: (_____) _____

Print