RELIANCE STANDARD
Life Insurance Company

Short-Term Disability Benefits
Initial Statement of Claim

HOW TO FILE A CLAIM

Please follow the instructions listed below to avoid unnecessary delays in processing your claim. This form must be fully completed for each disability claim. If the claim form is not fully completed, the processing of the claim may be delayed.

Employer: 1) Complete and sign Part I;
2) Fill in the boxes at the top of the AUTHORIZATION FOR USE IN OBTAINING INFORMATION form and Part III;
3) Attach job description and proof of earnings as defined by applicable policy (e.g. payroll records, W-2, K1, 1099, etc.)

Insured: 1) Complete and sign Part II answering all questions; and
2) Complete and sign the AUTHORIZATION FOR USE IN OBTAINING INFORMATION form, and
3) Have the attending physician complete and sign the ATTENDING PHYSICIAN STATEMENT.

The completed claim forms and attachments can be faxed to 267-256-3519, mailed to Reliance Standard Life, P.O. Box 7749, Philadelphia, PA 19101-7749 or scanned and emailed to claimsintake@rsli.com.

PART I — FOR EMPLOYER TO COMPLETE

Name of Insured (Last, First, Middle Initial)	Date of Birth	Social Security No.	Policy No.

Job Title	Insurance Class	Hire Date	Date Enrollment Card Signed	Effective Date of Insurance

Date Laid Off (If Applicable)	Date Retired (If Applicable)	Weekly Earnings	Date Last Worked	Date Returned to Work

Is Employee receiving sick leave benefits from present employer? ☐ Yes ☐ No	Date Began	Dated Ended	Reason For Stopping Work

Is disability work related? ☐ No ☐ Yes If "Yes," Explain	Brief Description of Duties

Employer Name & Address	Employer's Telephone Number Ext.

Authorized Signature Date	Fax Number	Email Address

PART II — FOR INSURED TO COMPLETE

Home Address (Street, City, State, Zip)	Gender: ☐ Male ☐ Female	Dominant Hand: ☐ Right ☐ Left

Is this Claim Based on an accident? ☐ Yes ☐ No	Did injury occur at work? If "Yes," for whom were you working? ☐ Yes ☐ No	Date you were first unable to work because of this disability

Date of Accident (if any)	Time AM ☐ PM ☐	How and where did accident happen?

Name and Address of Attending Physician	Date you returned to work

Are you now receiving Unemployment Compensation benefits? ☐ Yes ☐ No

Are you now receiving or eligible to receive as a result of this disability:
Social Security ☐ Yes ☐ No
Worker's Compensation ☐ Yes ☐ No
State Disability ☐ Yes ☐ No
No Fault Disability ☐ Yes ☐ No
Other _____ ☐ Yes ☐ No

If "Yes" give name and address of insurer, amount of income, date benefits began and ended.

We are required to withhold federal income tax from any benefit payments upon your request. If benefits are taxable by your state, we will also withhold state income tax upon your request. We must also send a report to your employer at the end of each calendar year showing your name, social security number, any benefits paid and any taxes withheld. If you would like us to withhold any taxes, please indicate the dollar amount to be withheld each week:

Federal Tax to be Withheld _____ ($20.00 Minimum per week, whole dollars only)
State Tax to be Withheld _____ ($ 2.00 Minimum per week, whole dollars only)

Any person who knowingly and with intent to injure Reliance Standard Life Insurance Company files a statement of claim or submits any information in conjunction with a claim containing fraudulent, false, misleading, incomplete or deceptive information commits a fraudulent insurance act, which is a crime. These actions will result in the denial of the claim, and are subject to prosecution under state and/or federal law. Reliance Standard Life Insurance Company will pursue any and all appropriate legal remedies arising from such fraudulent insurance acts.

Insured's Signature Date	Telephone Number ( )	E-Mail Address

RELIANCE STANDARD
LIFE INSURANCE COMPANY
A MEMBER OF THE TOKIO MARINE GROUP

AUTHORIZATION FOR USE IN OBTAINING INFORMATION

NAME OF INSURED: _____
INSURED'S DATE OF BIRTH: _____
POLICYHOLDER: _____

To all physicians and other health care professionals, hospitals, other health care institutions, insurers, medical, hospital and prepaid health plans, pharmacies, pharmacy benefit managers, employers, group policyholders, contract holders, governmental agencies (including but not limited to the Internal Revenue Service and the Social Security Administration), private and/or public benefit plan administrators, and/or attorney representatives, including but not limited to covered entities and business associates under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and the accompanying regulations:

You are authorized to provide Reliance Standard Life Insurance Company and/or its authorized administrators including but not limited to Matrix Absence Management, with information concerning medical care, advice, and/or treatment provided to me, the above named Insured, and/or any employment, salary, tax and/or benefit-related information concerning me, the above named Insured. I understand that the disclosure of information may include disclosure of protected health information under HIPAA and the accompanying regulations, information regarding treatment for mental illness, the human immunodeficiency virus (HIV) and/or the use of drugs and alcohol. I also understand that information used or disclosed pursuant to this authorization may be subject to redisclosure by the recipient and will no longer be subject to protection under HIPAA and the accompanying regulations. A statement of Reliance Standard Life Insurance Company's privacy policy is available at www.rsli.com or upon request.

I understand that any such information will be used for the purpose of evaluating my claim for benefits. Upon request, I understand that I am entitled to receive a copy of this Authorization. This Authorization is valid from the date signed for the duration of the claim, and may be revoked by me at any time upon written request to the address above. A reproduction of this Authorization shall be considered as valid as the original.

_____ _____
Date Insured's Signature

(If the Insured is unable to sign, an authorized person may sign.)

_____ _____
Date Authorized Person's Signature

Description of Authorized Person's authority to sign on behalf of Insured:

_____

PART III	ATTENDING PHYSICIAN'S STATEMENT (PLEASE ANSWER ALL QUESTIONS AND SIGN)	
Name of Insured		Social Security No.
Policyholder Name	Policy Number	Policyholder Phone

ICD – 9 CODE(S)	DIAGNOSIS DESCRIPTION(S)

Surgical or Obstetrical Procedure

Current Medications

Is condition due to injury or sickness arising from patient's employment? ☐ Yes ☐ No	Has patient ever had same or similar symptoms? ☐ Yes ☐ No	If Yes, when
Date symptoms first appeared or accident happened	Date patient first consulted you for this condition	Is patient still under your care for this condition? ☐ Yes ☐ No
If condition is due to pregnancy, give LMP and expected date of delivery. LMP _____ Expected Date of delivery _____	If patient hospitalized, give name of hospital	Admission Date _____ Discharge Date _____
Is patient able to perform his/her job? ☐ Yes ☐ No	Date patient was continuously unable to work	From _____ To _____
Estimate date patient should be able to return to work.	Patient will be partially disabled From:	To:

MENTAL CONDITION

Is the patient competent to endorse checks and direct the use of the proceeds thereof? ☐ Yes ☐ No

COMPLETE THIS SECTION ONLY IF DISABILITY IS DUE TO CARDIAC CONDITION

Functional Capacity (American Heart Ass'n)	☐ Class 1 (no limitation) ☐ Class 3 (marked limitation)	☐ Class 2 (slight limitation) ☐ Class 4 (complete limitation)	
Blood Pressure and Dates			

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Physician's Name, Address, ZIP (Please Print or Type)

Telephone Number ( )	Fax Number ( )		Specialty
Physician's Signature	Date	Degree	Physician's Tax ID No.

IMPORTANT: PLEASE ATTACH ALL MEDICAL RECORDS FROM THREE (3) MONTHS PRIOR TO DATE OF DISABILITY TO PRESENT.

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