Short-Term Disability
Plan Sponsor Package

How to use this package:

REVIEW	• The links below will take you to the Plan Sponsor's Statement and Disability Job Demands Questionnaire included in this package. The "Return to Introductory Page" link on each document will take you back to this page.
COMPLETE	• You are able to save information typed into the forms. • Complete the Plan Sponsor's Statement in its' entirety. • Complete the Job Demands Questionnaire if the plan member is expected to be absent for 4 weeks or more.
SUBMIT	**FAX** • Print the completed Plan Sponsor's Statement (pages 2 - 4) and Job Demands Questionnaire (pages 5 - 7, if submitting) and sign the Declarations at the end of the forms. • Fax the forms to the Sun Life Group Disability Management office that manages your claims. You do not need to mail information that you fax. Please retain the original copy for your records. **EMAIL OPTION** • Contact your Service Representative for information on how to register your email domain for Transport Layer Security (TLS) e-mail submission. • Sun Life will not accept the confidential information contained on these forms by email unless TLS secured electronic submission is set-up.

Plan Sponsor's Statement for Short-Term Disability Benefits

Disability Job Demands Questionnaire

Plan Sponsor's Statement
Claim for Short-Term Disability benefits

Sun Life Financial

Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies, is committed to keeping your information confidential.

Clear

1 Plan Member information

Sun Life Assurance Company of Canada must receive the Plan Member's Statement, Attending Physician's Statement and this form in order to review this claim. Please complete this form in its entirety in order to avoid delays.

First name	Last name (Quebec residents – maiden name)	☐ Male ☐ Female	Date of birth (dd-mm-yyyy)
			– –

Address (street number and name)	Apartment or suite

City	Province	Postal code

Home telephone number	Alternate telephone number
– –	– –

Regular occupation title/Job name

2 Plan Sponsor information

Please also submit the form, Disability Job Demands Questionnaire if the member is expected to be absent for 4 weeks or more.

Contract number	Sub./Class	Member ID	Division/Billing group number

Company name

Address (street number and name)

City	Province	Postal code

Contact person

Contact's telephone number	Ext.	Email address
– –		

3 Employment information

This section asks for information on the member's employment and coverage status. This part should be completed by the person most familiar with these topics (for example, the Payroll Administrator or the Plan Administrator).

Date member started with the company (dd-mm-yyyy)	Last date of full-time duties/hours (dd-mm-yyyy)	Last date of modified work (if applicable) (dd-mm-yyyy)
– –	– –	– –

Was the member's employment terminated? ☐ No ☐ Yes If *yes*, on what date? Date (dd-mm-yyyy) – –

To the best of your knowledge, why did the member stop working?

Return to Introductory Page

3 Employment information (continued)

Date member returned to full-time duties (dd-mm-yyyy)	Date member returned to modified work (dd-mm-yyyy)
– –	– –
If applicable, please describe modifications	

Employment class (check one box in each row)

a) ☐ Full-time ☐ Part-time How many hours per week? _____
b) ☐ Permanent ☐ Contract ☐ Temporary ☐ Seasonal
c) ☐ Hourly ☐ Salaried ☐ Commissioned
d) ☐ Union

Is the member involved in shift work? ☐ No ☐ Yes If *yes*, provide details of the actual rotation schedule for the three months prior to the disability date and the planned schedule for the claimed disability period.

4 Coverage information

Date member's Short-Term Disability coverage became effective with Sun Life Assurance Company of Canada (dd-mm-yyyy)	Date member's Long-Term Disability coverage became effective with Sun Life Assurance Company of Canada (dd-mm-yyyy)
– –	– –

Was the member's coverage in force on the last day worked? ☐ Yes ☐ No If *no*, please provide date and reason (e.g. layoffs)

5 Earnings and benefit information

Member's regular salary at the last date worked	Less Federal/Provincial income tax
$ _____ per week	$ _____
Date this salary became effective (dd-mm-yyyy)	Last day member's salary was paid (dd-mm-yyyy)
– –	– –
Average monthly commissions earned in the last 24 months. $ _____	If applicable, please provide a copy of the tax information slips issued for the past two years for this commissioned member.

Total personal income tax exemptions according to the last TD1 form (Federal)	Total personal income tax exemptions according to the last TP-1015-3V form (Quebec residents only)	Social Insurance Number
$	$	

1. Is the plan under which this member is covered taxable? ☐ No ☐ Yes
   If *yes*, please provide the Social Insurance Number above for the member as it is required for the issuance of the applicable tax information slip(s).
2. Did the member have any scheduled vacation days after the last day worked? ☐ No ☐ Yes
   If *yes*, how many days? _____
3. Does the member have unused sick leave? ☐ No ☐ Yes If *yes*, how many days? _____
4. What income, if any, does the member receive from you during the absence? Please provide dates and amounts.

How long will this income continue?

What income, if any, does the member receive (or will receive) during the course of this claim from your retirement or pension plan?

Return to Introductory Page

5 Earnings and benefit information (continued)

5. Is the member entitled to any other benefits from any other source (e.g. WCB/WSIB/CSST/CPP/QPP)?
☐ No ☐ Yes If *yes*, please describe.

From what date? Date (dd-mm-yyyy) – –

6. If the disability is due to pregnancy, has or will the member receive any maternity leave? ☐ No ☐ Yes

Date maternity leave begins Date (dd-mm-yyyy) – –

Date maternity leave ends Date (dd-mm-yyyy) – –

7. Are modified duties available? ☐ No ☐ Yes

Were modified duties offered? ☐ No ☐ Yes If *yes*, please describe duties (part-time/full-time/modified).

Did the member accept modified duties if offered? ☐ Yes ☐ No If *no*, please provide details below.

6 Declaration

I certify that the statements in this form are true and complete.

Last name of person signing this statement (please print)	First name	Position
Authorized signature X		Date (dd-mm-yyyy) – –
Telephone number – –	Fax number – –	

Visit our website:
www.sunlife.ca/
health and work

To ensure prompt submission, please fax this form, along with any other information in support of the plan member's claim, to the number that appears below for the Sun Life Assurance Company of Canada Group Disability Management Office that manages your claims. Please retain the original copy for your records. You do not need to mail information that you fax. If you are unable to fax this information, you can mail it to the appropriate address.

Halifax:
Fax: 1-866-639-7850
PO Box 11480 Stn CV
Montreal QC H3C 5P5

Montreal:
Fax: 1-866-639-7846
PO Box 11037 Stn CV
Montreal QC H3C 4W8

Toronto:
Fax: 1-866-639-7851
PO Box 950 Stn A
Toronto ON M5W 1G5

Kitchener - Waterloo:
Fax: 1-866-209-7215
PO Box 100 Stn C
Kitchener ON N2G 3W9

Edmonton:
Fax: 1-866-639-7820
PO Box 2733 Stn Main
Edmonton AB T5J 5C9

Vancouver:
Fax: 1-866-639-7829
PO Box 48810 Stn Bentall
Vancouver BC V7X 1A6

Return to Introductory Page

Disability Job Demands Questionnaire

Sun Life Financial

Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies, is committed to keeping your information confidential.

This form is to be completed by the Plan Sponsor and submitted with the Plan Sponsor's Statement if the plan member is expected to be absent for 4 weeks or more.

1 Plan member information

Contract number	Sub./Class	Member ID	Division/Billing group number

Last name (Quebec residents – maiden name)	First name

☐ Male ☐ Female	Date of birth (dd-mm-yyyy)	Company name

Regular occupation title/Job name

2 Work environment and job activities

The remainder of this form asks for information on the plan member's specific job duties and should be completed by the plan member's immediate supervisor.

Attach extra sheets, if necessary.

If there is a prepared job description, please attach it to this form.

1. Does the plan member's job require work in any of the following conditions:

Outside	☐ No	☐ Yes	If yes, what percentage of time?	%
In extremes of cold or heat	☐ No	☐ Yes	If yes, what percentage of time?	%
In a damp or humid environment	☐ No	☐ Yes	If yes, what percentage of time?	%
In a noisy environment	☐ No	☐ Yes	If yes, what percentage of time?	%
In a dusty or unventilated environment	☐ No	☐ Yes	If yes, what percentage of time?	%
Around toxic fumes	☐ No	☐ Yes	If yes, what percentage of time?	%

2. Does the plan member's job involve handling chemicals? ☐ No ☐ Yes
If yes, please list the chemicals below.

3. During the plan member's normal routine, what percentage of time does the job require the member to lift or carry the following weights?

	Never	1 to 25%	25 to 50%	50 to 75%	75 to 100%
More than 50 lbs/22.7 kg	☐	☐	☐	☐	☐
More than 20 lbs/9.1 kg	☐	☐	☐	☐	☐
More than 10 lbs/4.5 kg	☐	☐	☐	☐	☐

Return to Introductory Page

2 Work environment and job activities (continued)

4. During the plan member's normal routine, what percentage of time does the job involve the following activities?

	Never	1 to 25%	25 to 50%	50 to 75%	75 to 100%
Walking	☐	☐	☐	☐	☐
Climbing	☐	☐	☐	☐	☐
Driving:	☐	☐	☐	☐	☐
Daytime	☐	☐	☐	☐	☐
Nighttime	☐	☐	☐	☐	☐
Reaching:	☐	☐	☐	☐	☐
Above shoulder height	☐	☐	☐	☐	☐
At shoulder height	☐	☐	☐	☐	☐
Below shoulder height	☐	☐	☐	☐	☐
Bending or crouching	☐	☐	☐	☐	☐
Kneeling or crawling	☐	☐	☐	☐	☐

5. How much time is the plan member required to maintain the following activities before changing position or activity?

	0 to 30 minutes	30 to 60 minutes	60 to 90 minutes	More than 90 minutes
Sitting at one time	☐	☐	☐	☐
Standing at one time	☐	☐	☐	☐
Driving at one time	☐	☐	☐	☐

6. During the average day, what is the number of hours the plan member spends in the following positions or activities?

	0 to 2 hours	2 to 4 hours	4 to 6 hours	6 to 8 hours
Sitting	☐	☐	☐	☐
Standing	☐	☐	☐	☐
Driving	☐	☐	☐	☐

7. Please list any machines, tools, or other equipment that the plan member uses on the job. You can either list the number of times per day the equipment is used or the percentage of time spent using the equipment, whichever is more applicable.

Type of equipment	No. of times per day OR Percentage of time

8. Cognitive/non-physical aspects of the job

Does the plan member have to answer complaints? ☐ Yes ☐ No

Is the plan member primarily evaluated on production? ☐ Yes ☐ No

Does the plan member work closely with co-workers? ☐ Yes ☐ No

Is the plan member responsible for the performance objectives/decision–making within his/her particular department? ☐ Yes ☐ No

Number of people this plan member supervises: ☐

What percentage of the plan member's time is spent in the following activities?

Talking	Writing	Supervising other people
%	%	%

Please list any other relevant aspects of the job that may be considered stressful.

Return to Introductory Page

3 Additional remarks

Please provide any additional information that may be relevant to this claim which has not been previously provided.

4 Declaration

I certify that the statements in this form are true and complete.

Last name of person signing this statement (please print)	First Name
Position of person signing this statement (please print)	
Authorized signature X	Date (dd-mm-yyyy)
Telephone number	Fax number

Visit our website:
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health and work

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Halifax:
Fax: 1-866-639-7850
PO Box 11480 Stn CV
Montreal QC H3C 5P5

Montreal:
Fax: 1-866-639-7846
PO Box 11037 Stn CV
Montreal QC H3C 4W8

Toronto:
Fax: 1-866-639-7851
PO Box 950 Stn A
Toronto ON M5W 1G5

Kitchener - Waterloo:
Fax: 1-866-209-7215
PO Box 100 Stn C
Kitchener ON N2G 3W9

Edmonton:
Fax: 1-866-639-7820
PO Box 2733 Stn Main
Edmonton AB T5J 5C9

Vancouver:
Fax: 1-866-639-7829
PO Box 48810 Stn Bentall
Vancouver BC V7X 1A6

Return to Introductory Page