



Send to: Group Long Term Disability Claims, P.O. Box 26025, Lehigh Valley, PA 18002-6025  
 For Customer Service: (800) 538-4583 Fax: (610) 807-8221  
 Secure E-mail: www.GuardianAnytime.com, click Secure Channel, select Group\_LTD\_Claims@glic.com

**EMPLOYEE SECTION**

1. Employee Name		2. DOB ____/____/____	3. Plan #
4. Address	City	State	Zip
6. Employer Name			5. Phone # ( )
			7. Occupation

**AUTHORIZATION**

8. I authorize any physician, medical practitioner, hospital, clinic, other health facility, consumer reporting agency, the Social Security Administration, the Medical Information Bureau, insurance or reinsurance company, or employer to release any and all medical and non-medical information in its possession about me to The Guardian Life Insurance Company of America or its legal representatives. Medical information means all information in the possession of or derived from providers of health care regarding the medical history, mental or physical condition, or treatment of me. I understand that Guardian will use the information obtained by this authorization to determine eligibility for insurance or eligibility for benefits under an existing plan. Guardian will not release any information obtained to any person or organization except to reinsurance companies, the Medical Information Bureau, or other persons or organizations performing business or legal services in connection with my application, claim, or as may be lawfully required or permitted, or as I may further authorize. I know that I may request and receive a copy of this authorization. I agree that a photocopy of this authorization shall be as valid as the original. I agree that this authorization shall be valid for the duration of my claim.

**“Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime. In New York the person shall also be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation. In California, any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.”**

Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

**PHYSICIAN SECTION** Completion of this form will help to expedite processing of the claim and reduce additional requests and follow up. Your patient is responsible for the cost of completing this form.

1. Diagnosis (including any complications)	ICD9 or DSM IV Codes:
2. Medical evidence that substantiates or contributes to this patient's inability to work (please attach results of x-rays, MRIs, EKGs, etc.)	
3. Subjective Complaints	

**CONDITION HISTORY**

4. Patient's symptoms are the result of (check all that apply)	
<input type="checkbox"/> Employment	<input type="checkbox"/> Pregnancy
<input type="checkbox"/> Illness	<input type="checkbox"/> Motor Vehicle Accident
	<input type="checkbox"/> Other Accident
	<input type="checkbox"/> Other _____
5. Date symptoms first appeared or accident occurred ____/____/____	6. Date of your first evaluation for this condition ____/____/____
7. Frequency of visit/treatment for this condition <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other _____	8. Date of most recent visit/treatment for this condition ____/____/____
9. If inability to work is due to pregnancy, please indicate <input type="checkbox"/> expected <input type="checkbox"/> actual (check one) delivery date: ____/____/____ Type of delivery (if applicable) <input type="checkbox"/> Vaginal <input type="checkbox"/> C-section <input type="checkbox"/> Single Birth <input type="checkbox"/> Multiple Births	
10. Has this patient ever had a similar or related condition? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes", when ____/____/____ Explain:	
11. Was this patient referred to you by another physician? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes", please supply physician's complete name and address, specialty, phone # and fax #:	
12. Did you refer this patient to another physician/or provider for treatment of this or a related condition? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes", please supply the physician's/provider's complete name and address, phone # and fax #:	

13. Please supply complete name, address and specialty of any other treating physicians or hospitals including phone # and fax #.						
Name	Specialty	Address	Phone #	Fax #	From	Treatment To
_____	_____	_____	_____	_____	____/____/____	____/____/____
_____	_____	_____	_____	_____	____/____/____	____/____/____
_____	_____	_____	_____	_____	____/____/____	____/____/____

If additional space is needed, please attach a separate sheet

**TREATMENT**

14. Describe this patient's treatment program: (including any surgeries with date and CPT codes) \_\_\_\_\_  
 \_\_\_\_\_  
 Medications \_\_\_\_\_ Counseling \_\_\_\_\_  
 Therapies \_\_\_\_\_ Vocational rehabilitation \_\_\_\_\_

**PROGRESS**

15. Patient has  Recovered  Not Changed  
 Improved  Retrogressed

16. Patient is  Ambulatory  House Confined  Other \_\_\_\_\_  
 Bed Confined  Hospital Confined

17. Did you place the patient on off work status?  Yes  No

18. If yes, what date? \_\_\_\_ / \_\_\_\_ / \_\_\_\_

19. Has patient been released to return to work?  Yes  No

If "Yes", date patient was released to return to work? \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Part Time  Usual Occupation  
 Full Time  Other Occupation  
 Other \_\_\_\_\_

20. If not yet released to return to work, when do you anticipate a release? \_\_\_\_ / \_\_\_\_ / \_\_\_\_  Part Time  Full Time  Never

21. Physical LIMITATIONS that preclude RETURN TO WORK

Class 1 No limitation of functional capacity; capable of heavy work\* no restrictions (0-10%)  
 Class 2 Medium manual activity\* (15-30%)  
 Class 3 Slight limitation of functional capacity; capable of light work\* (35-55%)  
 Class 4 Moderate limitations of functional capacity; capable of clerical/administrative (sedentary\*) activity (60-70%)  
 Class 5 Severe limitations of functional capacity; incapable of minimal (sedentary\*) activity (75-100%)

**Remarks**

\*As defined in the Federal Dictionary of Occupational Titles

22. Degree of **mental/nervous impairment** Current GAF (**Global Assessment of Functioning**) \_\_\_\_/90 Please attach mental status exam.  
 Axis 1 \_\_\_\_\_ Axis 3 \_\_\_\_\_  
 Axis 2 \_\_\_\_\_ Axis 4 \_\_\_\_\_

23. Do you believe that this patient is competent to endorse checks and direct the use of the proceeds?  Yes  No

24. Degree of **Cardiac Functional Capacity** (American Heart Association)  
 Class 1 (No Limitation)  Class 2 (Slight Limitation)  Class 3 (Marked Limitation)  Class 4 (Complete Limitation)  
 Please supply patient's: height \_\_\_\_\_ weight \_\_\_\_\_ blood pressure \_\_\_\_\_

**PLEASE ATTACH PERTINENT MEDICAL RECORDS INCLUDING BUT NOT LIMITED TO PROGRESS NOTES, DIAGNOSTIC TEST RESULTS, DISCHARGE SUMMARIES, OPERATIVE REPORTS, CONSULTATION REPORTS AND MENTAL STATUS EXAM (IF APPLICABLE). THIS WILL HELP TO EXPEDITE PROCESSING OF CLAIM AND REDUCE ADDITIONAL REQUESTS AND FOLLOW UP. YOUR PATIENT IS RESPONSIBLE FOR THE COST OF THE MEDICAL RECORDS.**

**PHYSICIAN INFORMATION**

25. Physician's Name		26. Degree	27. Specialty	
28. Address		29. City	30. State	31. Zip
32. Telephone # ( )	33. Fax # ( )	34. Tax ID #		

**35. Remarks****FRAUD NOTICE**

**Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties. This includes Employee and Attending Physician portions of the form.**

\* \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
 Signature of Physician (no stamp)