

Employee Checklist



Employee Checklist to Apply for the Disability Income Plan

1. Employee Name:

2. Employer/Division:

- Contact your Employer/Human Resources Department
- Direction to Pay Form (if applicable)
- Long - Term Disability Benefits - Employee Statement
- Direct Deposit Form/Void Cheque
- Attending Physicians Statement
- Supporting Medical Documents
(Medical must support the full qualifying period)
 - Chart notes
 - Investigations/Tests
 - Consultation reports
 - Any additional material

3. Forms can be found on our website:

<https://www.plannera.ca/benefits/disability-income-plan/plan-forms>