

**Submit online:**[desjardinslifeinsurance.com/send](http://desjardinslifeinsurance.com/send)Complete and save the form on your computer first.  
Keep original forms for your records.**By mail:**PO Box 1203 STN A  
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for your records.**By fax:**1-844-409-6571 (toll free)  
416-926-0697

Keep original forms for your records.

**Insurance**

Life • Health • Retirement

GROUP INSURANCE - DISABILITY CLAIMS

**DISABILITY OR WAIVER OF PREMIUM CLAIM****EMPLOYER STATEMENT****A - IDENTIFICATION****We are unable to assess this claim unless all questions are answered completely.**

<b>EMPLOYEE</b> Last name and first name Naveau Shannon		Certificate or identification no.	Social insurance no.* 501-603-757
Address of employee - No., street, apt. 45-630 Riverpark Rd		City Timmins	Province Ontario
Postal code P4P 1B4		Telephone no.: ( 705 ) 2 8 8 - 9 0 0 7	
E-mail address:		<b>POLICYHOLDER OR EMPLOYER</b> Name CINUP	
Policy or group or contract no. 641028		Division no.	
Address of policyholder or employer - No., street, suite 1805 Arthur St		City Thunder Bay	Province Ontario
Postal code P7E 2R6		Telephone no.: ( 807 ) 6 2 2 - 1 4 1 3	
Fax no.: ( ) -		YYYY MM DD	

**COMPLETE IF SELF-ADMINISTERED: Effective date of coverage:****Class no.:**

\* Social insurance number is necessary only if the disability claims are taxable.

**B - GENERAL INFORMATION****If the benefits are taxable, the basic tax deductions will be made.  
In all other cases, please provide the appropriate tax forms.**

<b>1</b> Current salary <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> Every two weeks Amount \$ 1,923.08	<b>2</b> Salary effective date YYYY MM DD 2 0 1 8 - 0 1 - 2 9	<b>3</b> Job status <input checked="" type="checkbox"/> Full time <input type="checkbox"/> Part time
<b>4</b> Indicate days in normal work week <input type="checkbox"/> SUN <input checked="" type="checkbox"/> MON <input checked="" type="checkbox"/> TUE <input checked="" type="checkbox"/> WED <input checked="" type="checkbox"/> THU <input checked="" type="checkbox"/> FRI <input type="checkbox"/> SAT Hours worked per week 35.00	<b>5</b> Type of schedule <input type="checkbox"/> Variable <input checked="" type="checkbox"/> Rotating	<b>6</b> Premium paid by <input checked="" type="checkbox"/> Employer <input type="checkbox"/> Employee <input type="checkbox"/> Both
<b>7</b> Date of employment YYYY MM DD 2 0 1 8 - 0 1 - 2 9	<b>8</b> Occupation Gladue Case Worker	<b>9</b> Date last worked YYYY MM DD 2 0 2 2 - 0 7 - 1 5 No. of hours worked 7.00
<b>10</b> Is disability due to an accident? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", date of accident:	<b>11</b> Did or will the employee receive any income during the disability period? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", indicate below: (Type: holiday pay, maternity, disability, EI benefits, salary, lump sum, other) Type: Amount: \$ Period:	
<b>12</b> If the employee is pregnant, has an application for a preventive withdrawal been, or will it be, submitted to the CNESST (Québec only)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>13</b> Has a claim been filed with a government agency? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", indicate below: <input type="checkbox"/> CNESST / WCB / WSIB / WHSCC <input type="checkbox"/> CPP / QPP <input type="checkbox"/> SAAQ (Québec only) <input type="checkbox"/> Other, specify: _____ YYYY MM DD	
<b>14</b> Has the employee returned to work? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", on what date: YYYY MM DD	<b>15</b> Is this person still in your employ? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No - Termination date: YYYY MM DD Reason:	
<b>16</b> Was this person given a record of employment? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>17</b> Are there any work-related factors that may have contributed to the employee's disability or had an impact on their return-to-work? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes - Please specify: Shannon works with clients in crisis and/or have been through trauma and have been incarcerated. Shannon will need to be able to work in this type of environment and be able to assist clients accordingly. She would need to be mentally and emotionally well to do her job.	
<b>18</b> Is your employee eligible for an exemption under the Indian Act (R.S.C. (1985), c. I-5)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If so, please indicate the percentage of employment income that is not taxable: 100.00 %		

**PLEASE COMPLETE THE BACK OF THE FORM.**

**C - PHYSICAL WORK ENVIRONMENT**

Please attach a brief job description if available.

- 1 What are the main duties of the employee's job and how much time is allocated to each one weekly?
- |        |   |      |        |   |      |
|--------|---|------|--------|---|------|
| Duties | meet with clients and support in Gladue process | 25 % | Duties | Refer client to appropriate aftercare                     | 25 % |
| Duties | Meet with clients to provide aftercare planning | 25 % | Duties | Assist clients in court process, carry out recommendation | 25 % |

For questions 2 and 3, **FREQUENCY** is defined as follows:

**OCCASIONALLY:** 0-15 % of the times      **FREQUENTLY:** 16-50 % of the time      **ALWAYS:** 51 % + of the time

- 2 Work environment - Does the employee's job require work in any of the following conditions?

FREQUENCY:	O	F	A	FREQUENCY:	O	F	A	FREQUENCY:	O	F	A
<input checked="" type="checkbox"/> Outside	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> In a damp or humid environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Above or below ground level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> In extremes of cold or heat	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Toxic fume	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Handling chemicals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Does the job involve other hazards?     Yes     No    If "Yes", please list:

- 3 Check the items below that relate to the employee's job, and complete the information requested.

FREQUENCY:	O	F	A	FREQUENCY:	O	F	A	FREQUENCY:	O	F	A
<input checked="" type="checkbox"/> Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Bending over	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Extending/reaching above head	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Walking	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Kneeling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Crouching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Stairs (No. of steps <u>30</u> )	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Keeping one's balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Crawling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Ladders (Height _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIBE ACTIVITY AND SPECIFY FREQUENCY AND WEIGHT:

	FREQUENCY:	O	F	A	WEIGHT:
<input type="checkbox"/> Pushing _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Lb <input type="checkbox"/> Kg
<input type="checkbox"/> Pulling _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Lb <input type="checkbox"/> Kg
<input type="checkbox"/> Lifting/carrying _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Lb <input type="checkbox"/> Kg

Please list any office equipment, motor vehicle, tools or other equipment that is used in the employee's job.

Type of equipment	Photocopier	Times per day	3
Type of equipment	Personal Vehicle	Times per day	1

- 4 Does the employee work in an extremely noisy environment, have to work at a fast pace, do repetitive movements or have short deadlines?     Yes     No


If "Yes", please specify: Employee works with a case load of files for clients, she carries out the sentencing recommendations in case management for clients to receive appropriate aftercare services, takes clients to medical, probation, and treatment appointments. See attached job description.

- 5 Does the employee's job require dexterity?     Yes     No

If "Yes", please specify: Employee is at desk and works with laptop entering casenotes onto the database.

**D - ADDITIONAL INFORMATION**

**SIGNATURE OF THE AUTHORIZED PERSON**

Colette Shwetz	HR Manager
Last name and first name of the authorized person (IN BLOCK LETTERS)	Position
cshwetz@nanlegal.on.ca	
E-mail address	
	<u>July 24/22.</u>
Signature	Date



# Nishnawbe-Aski Legal Services Corporation

GLADUE CASE WORKER

## Job Description

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**Title:** Gladue Case Worker

**Dept.:** Gladue

**Reports to:** Gladue Team Leader

**JD #:** Gladue 0002

**Approved:** April 1, 2021

**REVIEWED:** April 1, 2021

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## Summary

The Gladue Caseworker is responsible for assisting aboriginal offenders in fulfilling the recommendations made in a Gladue report written on their behalf. The Gladue Caseworker will provide direct services, and make necessary referrals to programs and services in the community to ensure the clients receive services in a timely fashion. The Gladue Caseworker will work in partnership with the Gladue Writer, Courts and/or Probation and Parole Services in providing necessary client input and updates as required.

## Core Competencies:

- Group facilitation, team building and decision making skills; ability to problem solve and take initiative.
- Self-motivated individual with the ability to work with minimal supervision in a team oriented setting.
- Effective crisis intervention skills.
- Proficiency in Microsoft Office including database applications.
- Ability to engage people to build trust and rapport; effective verbal and listening communication skills; excellent interviewing and counselling skills.
- Proficiency in Microsoft Office including database applications.
- Excellent case and file management skills, stress management and time management skills, ability to meet deadlines.

## Job Duties

### Program/Project Specific Management Work Duties

- Meet with clients to support them through the Gladue Report process.
- Work with the Gladue Writer in developing sentencing recommendations.
- Meet with clients to provide individual counselling and care plans.
- Advocate on behalf of and refer clients to appropriate services within the community.

- Meet with the client's family to facilitate the understanding and meeting the conditions the court have imposed.
- Provide recommendations and support to the family how they can support the client.
- Attend Court, specifically Bail Court to identify and advocate for clients who could benefit from a Gladue Report or Letter either at the Bail stage or Sentencing.

#### Program Administration PAPER WORK

- Complete applications for treatment centres and coordinate travel.
- Provide follow-up services to chart client's progress.
- Prepare Gladue letters when appropriate.

#### Outreach and Promotion/Public Relations OUTSIDE RELATIONS

- Work with the Gladue Team Leader, Gladue Writer and any additional partners to the Gladue Services program.
- Network with stakeholders, community agencies, participants, and families.
- Respond to general enquiries regarding the Gladue Services Program.

### **Relationships**

#### Executive Director

The Gladue Caseworker will keep the Gladue Team Leader and LAO Area Director apprised of all important matters related to the Gladue Aftercare Program by providing written reports for review and oral reports on an ad hoc basis.

#### Gladue Services Program

The Gladue Caseworker will keep the Gladue Team Leader apprised of all important matters related to their projects and clients by providing written reports for review and oral reports on an ad hoc basis.

#### NAN Legal Staff

The Gladue Caseworker will work collaboratively with other NAN Legal staff by maintaining communication lines to allow opportunity to share information relevant to the program.

### **Requirements**

- Preferred Community College diploma, University degree or equivalent in Social Services and/or a minimum of 5 years work in a social or justice services environment.
- Knowledge of the judicial system, Criminal Code, and other related federal and provincial statutes, and related court decisions regarding Aboriginal persons.
- Knowledge of Aboriginal culture and experience working with Aboriginal persons; understanding of the northern cultural environment; knowledge of an Aboriginal language(s) will be considered an asset.
- Experience in program delivery and administration.
- Ability to work flexible hours, including evenings and/or weekends.
- A clear criminal reference check (CPIC) and Vulnerable Sector Clearance will be a condition of employment
- Must have a valid Ontario driver's license and reliable transportation.

## **Reporting**

- Under direction of the Gladue Team Leader the Gladue Caseworker is responsible for the coordination and administration of the Gladue Aftercare Program.
- The Gladue Caseworker is accountable to the Gladue Team Leader and LAO Area Director for the efficient performance of his/her function.

## **Meetings, Training and Outreach**

- Participate in Gladue Aftercare Training as needed.
- Attend all meetings, telephone and video conferences, committees, as directed.
- Attend professional development, training, workshops, education, as directed.
- Develop positive relationships with justice providers, defense counsel, police authorities, community leadership, duty counsel, crown attorneys, probation, parole and more. Keep program coordinator, supervisor, manager, or director apprised.

## **File maintenance**

- Ensure all paper and electronic files are maintained up-to-date.
- Follow directives, guidelines, and policies for records management and file keeping policies.

## **Additional Duties and Responsibilities**

- Complete all additional responsibilities and duties as assigned.
- Other duties as assigned.

## **SALARY RANGE**

Pursuant to current wage grid.

## **Temporary Added Duties**

- Providing administrative support to the Gladue Manager and Gladue team.



## **EMPLOYEE DISABILITY CHECKLIST**

Please complete the enclosed forms in full, and in ink. Ensure all forms are signed and dated where applicable.

- *Direction and Authorization Form*
- *Employee Statement*
- *Attending Physician's Statement (take full package to your attending physician who will complete the appropriate form)*
- *Void cheque*

Mail, fax or email completed forms to:

Mail:           **JG Benefits Inc.**  
                  **1051 King Edward Street**  
                  **Winnipeg, MB R3H 0R4**

Fax:             **1-833-702-4687**

Email:          **[disability@cinup.ca](mailto:disability@cinup.ca)**

**Should you have any questions, please contact the CINUP Disability team at 1-800-665-1234**

# **Direction and Authorization Form**

**DIRECTION AND AUTHORIZATION TO RELEASE PERSONAL INFORMATION**

**FROM** Shannon Naveau  
Employee's (Claimant Name)

**TO** Desjardins Financial

**RE** RELEASE OF CONFIDENTIAL/PERSONAL INFORMATION TO  
JG Benefits Inc./CINUP (hereinafter "Policyholder")

**INDIVIDUAL POLICY NUMBER :** Select Policy Number

I hereby direct and authorize the company to discuss with the Policyholder (JG Benefits Inc./CINUP) any and all information or documentation concerning my claim and its evaluation by the company, including but not limited to, any medical, financial, vocational, rehabilitation, or any other confidential/personal information or documentation concerning my claim. I also authorize the Company (Desjardins Financial) to send to the policyholder, copies of correspondence the Company receives from me concerning my claim as well as any medical information received from external sources.

**Duration and Revocation**

I understand that

- It is not a requirement of the Policy/Policies that I authorize the company to disclose information to the Policyholder
- This authorization will remain valid for as long as I am claiming benefits or service from the Company; and,
- I am free to revoke this authorization at any time by sending written notice to the Company of such revocation.

I have read and understand the above. I am signing this voluntarily, and not under compulsion by anyone.

Shannon Naveau  
Signature of Claimant

July 20, 2022  
Date



# **Employee Statement**

**Submit online:**[desjardinslifeinsurance.com/send](http://desjardinslifeinsurance.com/send)Complete and save the form on your computer first.  
Keep original forms for your records.**By mail:**PO Box 1203 STN A  
Toronto ON M5W 1G6Send original forms and keep copies  
for your records.**By fax:**1-844-409-6571 (toll free)  
416-926-0697

Keep original forms for your records.

Contact us: 1-800-263-1810 (toll free) or 416-926-2990



GROUP INSURANCE - DISABILITY CLAIMS

**DISABILITY OR WAIVER OF PREMIUM CLAIM  
EMPLOYEE STATEMENT**➤ The payment of your disability claim will be made by direct deposit only. Please include a specimen cheque marked «VOID».**A - IDENTIFICATION** We are unable to assess this claim unless all questions are answered completely.

Last name and first name of employee <b>NAVEAU SHANNON</b>		Sex <input type="checkbox"/> M <input checked="" type="checkbox"/> F	Date of birth YYYY MM DD <b>1974 07 10</b>
Address - No., street, apt. <b>45-630 Riverpark Rd</b>		City <b>Timmins</b>	Province Postal code <b>Ontario</b>
Policy or group or contract no. <b>641028</b>	Division no. <b>59086</b>	Certificate or identification no. <b>006346908</b>	Social insurance no. <sup>1</sup> <b>501603757</b>

Telephone no. (mandatory): **(705) 288-9007** I authorize Desjardins Financial Security, hereinafter Desjardins Insurance, to leave me voicemail about my disability claim.E-mail address<sup>2</sup>: **snaveau@nanlegal.on.ca**<sup>1</sup> Your social insurance number is necessary only if your disability claims are taxable. Please contact your employer to obtain this information.<sup>2</sup> Please provide this information only if you authorize Desjardins Insurance to email you.**B - GENERAL INFORMATION****1** Training:Level of education: **Post Secondary**Work experience: **Administrative, Case Worker**Spoken language:  English  French Written language:  English  French

**2** Is disability due to an accident?  Yes  No

If "Yes", date of accident: YYYY MM DD

Time  AM  PM

Type of accident  Work-related  Motor vehicle  Other

Indicate details (where, how):

**3** Did you receive prior treatment for the illness or injury causing the disability?  Yes  No

If "Yes", give particulars including name, address and telephone number of all treating physicians and specialists:

**4** Name, address and telephone number of physicians and specialists who have treated you during the disability:

**Dr. Steven Lax**  
**Suite 201 227 Algonquin Blvd**  
**Timmins ON P4N 2R8**  
**705-264-8840**

**PLEASE COMPLETE THE BACK OF THE FORM.**

06329E01 (2018-11)

Desjardins Insurance refers to Desjardins Financial Security Life Assurance Company.

**B - GENERAL INFORMATION (CONTINUED)**

5 If you have any accident or sickness coverage through a union, society, creditor, mortgage, auto, lodge or other association, through another employer, under an individual policy, give the following particulars:

Name of insurer	Policy no.	Certificate no.	Start date of benefits			End date of benefits			Benefit amount	Weekly/Monthly	
			YYYY	MM	DD	YYYY	MM	DD		\$	<input type="checkbox"/> W
			YYYY	MM	DD	YYYY	MM	DD	\$	<input type="checkbox"/> W	<input type="checkbox"/> M
			YYYY	MM	DD	YYYY	MM	DD	\$	<input type="checkbox"/> W	<input type="checkbox"/> M

Comments:

*N/A*

**C - DIRECT DEPOSIT ENROLMENT**

Please include a specimen cheque marked "VOID".

I hereby authorize Desjardins Insurance to deposit my benefit payment through the DIRECT DEPOSIT system into account at the financial institution indicated below:

Name of financial institution: *TD Canada Trust* Institution no.: *004* Transit/branch no.: *00259* Account no.: *6578351*  
 Address - No., street, suite: *6 Pine Street South* City: *Timmins* Province: *Ontario* Postal code: *P4N 2J8*

Any credit entered in my account in accordance with this authorization will be identified with a DIRECT DEPOSIT transaction code and I acknowledge that the credit in question shall constitute an amount paid in accordance with this authorization.

This authorization will be effective on \_\_\_\_\_ . The authorization will terminate following a 10-day written notice by either Desjardins Insurance or me.

Signature of employee: *Shannon Dawson* Date: *July 20, 2022*

**D - PERSONAL INFORMATION MANAGEMENT**

Desjardins Insurance handles the personal information it has on you in a confidential manner. Desjardins Insurance keeps this information on file so that you may benefit from group insurance services offered by the Company. This information is consulted solely by Desjardins Insurance employees who need to do so in the course of their work. Desjardins Insurance may compile anonymized personal information for statistical and informational purposes. Desjardins Insurance may also communicate with plan members to provide them with optimal health management. You have the right to consult your file. You may also have information corrected if you demonstrate that it is inaccurate, incomplete, ambiguous or not useful. To do so, you must send a written request to the following address: Privacy Officer, Desjardins Insurance, 200, rue des Commandeurs, Lévis, Québec, G6V 6R2. Desjardins Insurance may use the client list to offer its clients an insurance product following the termination of their group insurance. If you do not wish to receive these offers, you may have your name removed from the list. To do so, you must send a written request to the Privacy Officer at Desjardins Insurance.

**E - DECLARATION AND AUTHORIZATION FOR THE COLLECTION AND COMMUNICATION OF PERSONAL INFORMATION**

To be completed for each claim.

I hereby certify that the above answers are full and true. I authorize Desjardins Insurance strictly for the purposes of determining my insurability, managing my file and settling my claims to: (a) collect from any person or legal entity, or from any public or parapublic organization, only the information deemed necessary to manage my file. The non-exhaustive list of sources from which information may be collected includes healthcare professionals or facilities, the MIB (formerly known as Medical Information Bureau), insurance companies, personal information officers or investigation agencies, the policyholder, my employer or former employers; (b) communicate to the said persons or organizations only the personal information about me that is deemed necessary for the purposes of my file (c) when necessary, request an inquiry report about me, and also use the personal information it may have about me in existing files that are now closed.

Provided that I have filled out the appropriate boxes, I authorize Desjardins Insurance to email me at the address provided in section A of this form and I give Desjardins Insurance permission to leave voicemail about my disability claim at the phone number provided on this form.

I authorize Desjardins Insurance to use or communicate my social insurance number for tax purposes. A photocopy of this authorization is as valid as the original.

Signature of employee: *Shannon Dawson* Date: *July 20, 2022*

**VERY IMPORTANT**

Please have the initial attending physician's statement completed and submit the completed forms online, or by mail or fax to: Desjardins Insurance - Disability Claims.



**TD Canada Trust**  
 6 Pine Street South 3760  
 TIMMINGS, ONTARIO P4N 2J8

**TD Canada Trust**  
**Info Sheet**

**How to Set up Direct Deposits or Pre-Authorized Debits**

TD CANADA TRUST  
 129 MAIN STREET  
 YOUR TOWN, PROVINCE L1L1L1

⑆00 1⑆ ⑆99999⑆00⑆ 9999⑆999999⑆

Transit No. Inst. No. Account No.

**Customer Name**

SHANNON LEE NAVEAU

**Transit No.**

0 0 2 5 9

**Inst. No.**

0 0 4

**Account No.**

6 5 7 8 3 5 1

You can find your branch address information on your cheques or by using our branch locator tool:  
[www.tdcanadatrust.com/locator](http://www.tdcanadatrust.com/locator)

**Direct Deposit**

Direct Deposit is the most convenient way to receive recurring deposits (i.e. pay, pension, government payments, annuity, interest, etc.) with immediate access to funds. There are no holds on your funds or a need for special trips to your local branch or ATM to deposit your cheques.

**To set up a Direct Deposit with the federal government:**

1. Visit [www.directdeposit.gc.ca](http://www.directdeposit.gc.ca) for a Government of Canada Direct Deposit enrolment form and use your account information from the fields above when completing the form.
2. If you do not have a cheque to void, have your local TD Canada Trust branch stamp the enrolment form.
3. Once complete, mail the enrolment form to the address provided.

*Note: Additional information may be required on the form such as your Social Insurance Number or date of birth. The form includes a toll free number for support with completing the form.*

**To set up a Direct Deposit with your employer:**

1. Provide your account information from the fields above to the payroll department of your employer or company pension provider.

**Pre-Authorized Debit (PAD)**

A Pre-Authorized Debit (PAD) is an automatic withdrawal taken directly from your TD Canada Trust account by a company or financial institution that you have authorized to do so. PAD is a great way for you to save time with bill payments (i.e. utilities, credit cards) you pay by mail, at the ATM, in branch or by phone; and may help you avoid late fees.

**To set up a PAD:**

1. Call or visit the website of the company you wish to set up a Pre-Authorized Debit (PAD) with to obtain a PAD Agreement and use your account information noted from the fields above when completing the Agreement.
2. If the company allows for online form submission on its website, you will need to first register for its website and should follow the instructions provided.

*Note: If your billing company accepts Visa Debit in Canada (or Visa internationally) and you have the enhanced TD Access Card, setting up a PAD will be easier than ever! Simply provide them with the card's 16 digit number in place of the account information noted above.*

# **Attending Physician Statement**

**(Please take full package to your physician)**

## IMPORTANT NOTE TO CLAIMANT

In order to avoid any delays in the assessment of your claim, please have your physician complete the appropriate Initial Attending Physician's Statement form:

- General	Form no. 12018E01
- Musculo-skeletal	Form no. 12019E01
- Psychiatric/psychological	Form no. 12020E01
- Cardiac	Form no. 12021E01
- Cancer	Form no. 12022E01

We have sent you all five of the above-mentioned Initial Attending Physician's Statement forms, each of which is specific to a particular illness. Please give all five forms to your physician so they can fill out the appropriate one.

It is important that your physician fully complete the form that best corresponds to your medical condition to ensure your claim is processed promptly.

**Short Term Disability:** Return the complete form to Desjardins Financial Security Life Assurance Company, hereinafter Desjardins Insurance, as soon as possible.

**Long Term Disability:** Return the complete form to Desjardins Insurance no later than six weeks prior to the start of your long-term disability period.

Online: [desjardinslifeinsurance.com/send](https://desjardinslifeinsurance.com/send)

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Desjardins Insurance  
PO Box 1203 STN A  
Toronto ON M5W 1G6

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Fax: 416-926-0697 or 1-844-409-6571



Submit online:  
[desjardinslifeinsurance.com/scan](https://desjardinslifeinsurance.com/scan)  
 Complete and save the form on your computer first.  
 Keep original forms for your records.



By mail:  
 PO Box 1203 STN A  
 Toronto ON M5W 1G6  
 Send original forms and keep copies for  
 your records.



By fax:  
 1-844-409-6571 (toll free)  
 416-926-0697  
 Keep original forms for your records.



## INITIAL ATTENDING PHYSICIAN'S STATEMENT PSYCHIATRIC/PSYCHOLOGICAL FORM

- A** PLEASE PRINT. **B** PART 1 to be completed by patient.  
**C** PART 2 to be completed by physician. **D** Any charge for completion of this form is the patient's responsibility.

### PART 1 - Identification of patient

Last name and first name (PLEASE PRINT) | Policy or group or contract no. | Certificate or identification no. | Date of birth  
 NAUEN, SHANNON | 641028 | |

NAUEN, SHANNON  
 PART 2 - Attending physician's statement

It is very helpful in facilitating a timely comprehensive informed adjudication decision to have your full clinical notes from the date of disability and any psychiatric/counsellor consultation reports for our review. Please include or indicate reasons for not including the requested information.

#### 1. Diagnosis (please use DSM-IV criteria)

- 1.1 Axis I: Depression  
 1.2 Axis II: Ø  
 1.3 Axis III: hypertension  
 1.4 Axis IV: family situation  
 1.5 Axis V - Current GAF score: 60

#### Supporting data

Please describe the symptoms (severity and frequency), that support each axis of your diagnosis.

Severe / constant  
N/A  
labile on NK lithium  
loss of sister

#### 2. History

- 2.1 When did symptoms start and/or worsen? S.L. Sept 20 Aug 31/2021  
 2.2 Date patient's condition first prevented them from working? 25/7/2022  
 2.3 Date of first visit for treatment or consultation: 06/07/2022  
 2.4 Has patient ever had same or similar condition?  Yes  No  Unknown If yes, state when and describe:  
 2.5 Were work problems a factor in the development of your patient's disorder?  Yes  No If yes, please describe:  
 2.6 Has a claim been filed with the Workers compensation Board?  Yes  No N/A  
 2.7 Date of latest visit: 01/20/2022  
 2.8 Frequency of visits:  Weekly  Monthly  Other: as required  
 2.9 Are patient's symptoms due to drug or alcohol abuse?  Yes  No  
 2.10 If yes, is patient enrolled in a substance abuse program?  Yes  No If yes, state facility:  
 2.11 Has your patient ever been enrolled in a substance abuse program?  Yes  No If yes, state when:

#### 3. Treatment for psychiatric/psychological illness

- 3.1 Is patient seeing or being referred to a psychiatrist?  Yes  No If yes, name of psychiatrist:  
 3.2 If pending, is there an appointment date?  Yes  No If yes, date: pending no date provided yet  
 3.3 Is patient seeing or being referred to a therapist?  Yes  No If yes, name of therapist: pet Louise Spence  
 3.4 Date of hospital inpatient admission: N/A Date of discharge:  
 Name of hospital:

#### 4. Precipitating and complicating factors

Please describe all factors that may have contributed to the onset of the clinical problem(s) or may complicate their resolution.

- Workplace issues  Social/Family issues  Physical/Mental condition  Financial/Legal problems  
 Coping skills  Alcohol/Drug abuse  Personality/Motivation  Other issues

Comments: \_\_\_\_\_

**5. Current treatment**

- 5.1 Therapy method: psychotherapy / psychiatry - therapy
- 5.2 Therapy goal: to resolve depression / anxiety
- 5.3 Frequency and length of therapy/counselling sessions: as per S.I
- 5.4 Number of therapy/counselling sessions to date: none
- 5.5 Treatment compliance: full
- 5.6 Treatment response to date: to early to say
- 5.7 Prognosis and time frame of illness: prognosis is reasonable

Medications:	Medication name			
	Date started			
	Initial dosage			
	Initial response			
	Date of last dosage change			
	Current dosage	<u>feel</u>	<u>med 5 summary</u>	
	Response		<u>enclosed</u>	
	Side effects			
	Compliance			
	Date medication discontinued			

**6. Future treatment plans**

What changes in your treatment plan are underway or are being considered?

covered above

**7. Return to work plans**

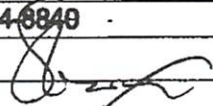
- 7.1 Prognosis for recovery: feel recovery uncertain
- 7.2 Expected date patient will return to their own occupation: Sept 30 / 2022
- 7.3 If unknown, please indicate the next follow up date: TBD
- 7.4 If your patient is unable to return to their regular occupation, please specify when and under what circumstances they could return to work (eg. modified duties, gradual return to work.): N/A
- 7.5 Have return to work time lines been discussed with the patient?  Yes  No
- 7.6 Please elaborate on time frames and patient's response: to soon
- 7.7 Is your patient a suitable candidate for vocational rehabilitation?  Yes  No If yes, please specify: not at present to disabled
- 7.8 When and under what circumstances could patient return to modified duties or a gradual return to work? when improvement in cognitive / concentration and stamina noted

**8. Comments**

Is there any other information you wish to add that will give us a better understanding of your patient's condition, treatment requirements, and motivation to return to work?

covered above

**9. Identification of physician**

9.1 Last name and first name (PLEASE PRINT) **DR STEVEN A. LAX** 9.2 Specialty CCFP License no. 51130  
 201-227 ALGONQUIN BLVD.W.  
 9.3 Address - No., street, suite **TIMMINS, ONT.** City Province Postal code  
 P4N 2R8  
 9.4 Telephone no.: ( **705-264-8849** ) Fax no.: ( )  
 Signature of physician:  Date: 20/07/22





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## INITIAL ATTENDING PHYSICIAN'S STATEMENT GENERAL FORM

- A** PLEASE PRINT.
- B** PART 1 to be completed by patient.
- C** PART 2 to be completed by physician.
- D** Any charge for completion of this form is the patient's responsibility.

### PART 1 - Identification of patient

Last name and first name (PLEASE PRINT)	Policy or group or contract no. 641028	Certificate or identification no.	Date of birth
---	---	-----------------------------------	---------------

### PART 2 - Attending physician's statement

It is very helpful in facilitating a timely comprehensive informed adjudication decision to have your full clinical notes from the date of disability and any consultation reports for our review. Please include or indicate reasons for not including the requested information.

#### 1. Diagnosis (including complications) - If psychiatric, give DSM-IV code.

1.1 Primary: \_\_\_\_\_

1.2 Secondary: \_\_\_\_\_

1.3 Subjective symptoms (including severity, frequency, duration): \_\_\_\_\_

1.4 Findings (please enclose a copy of current x-rays, EKGs, laboratory data, blood pressure and any other relevant clinical findings): \_\_\_\_\_

1.5 Degree of severity of all symptoms:  Mild  Moderate  Severe  With psychotic elements

#### 2. History

2.1 Date symptoms first appeared or accident happened: \_\_\_\_\_

2.2 Date patient's condition first prevented them from working: \_\_\_\_\_

2.3 Has this patient ever had same or similar condition?  Yes  No  Unknown  
 If yes, please specify diagnosis and dates of treatment: \_\_\_\_\_

2.4 Is condition due to injury or sickness arising out of patient's employments?  Yes  No  Unknown

2.5 Have Worker's Compensation/CSST forms been completed?  Yes  No  Unknown

2.6 If patient is pregnant, give E.D.C.: \_\_\_\_\_

2.7 Names and specialties of other treating physicians: \_\_\_\_\_

2.8 Current height: \_\_\_\_\_ Current weight: \_\_\_\_\_ Weight loss/gain to date: \_\_\_\_\_

#### 3. Treatment dates

3.1 Date of first visit for current condition: \_\_\_\_\_ 3.5 Date of discharge: \_\_\_\_\_

3.2 Date of latest visit: \_\_\_\_\_ 3.6 Date of out-patient treatment: \_\_\_\_\_

3.3 Frequency of visits:  Weekly  Monthly 3.7 Name of hospital: \_\_\_\_\_  
 Other (specify): \_\_\_\_\_

3.4 Date of in-patient admission: \_\_\_\_\_

#### 4. Nature of treatment

4.1 Medications (dose, frequency, date prescribed): \_\_\_\_\_

4.2 Surgeries (including dates): \_\_\_\_\_

4.3 Other (including frequency): \_\_\_\_\_

4.4 Is patient following recommended treatment program?  Yes  No (please elaborate): \_\_\_\_\_

**5. Progress**

- 5.1 Has patient:  Recovered  Improved  Not improved  Retrogressed  
 5.2 Current status:  Ambulatory  House confined  Bed confined  Hospital confined

**6. Restrictions and limitations**

		HOURS AT ONE TIME					TOTAL HOURS DURING THE DAY				
		<1	<1-2	<2-4	4-6	6-8	<1	<1-2	<2-4	4-6	6-8
6.1 Stand	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.2 Walk	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.3 Walk on uneven surfaces	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4 Sit	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.5 Drive	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.6 This patient can lift/carry a maximum of:											
	kgs	0	5	9	14	18	23	27	32	36	41+
	lbs	0	10	20	30	40	50	60	70	80	90+
6.7	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Repetitively: how much?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Occasionally: how much?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6.8 Please indicate in the space provided if this patient is able to perform the following actions: Frequently (F), Occasionally (O), or Not at all (N):  
 Drive: Bend: Squat: Kneel: Climb: Reach (above shoulders): Reach (below shoulder):

**7. Psychiatric illness (if applicable)**

- 7.1 History: \_\_\_\_\_  
 7.2 Precipitating chronological events: \_\_\_\_\_  
 7.3 Work issue related to this illness: \_\_\_\_\_  
 7.4 Pre-morbid personality: \_\_\_\_\_  
 7.5 Changes in ADL habits: \_\_\_\_\_  
 7.6 Familial risk factors: \_\_\_\_\_  
 7.7 Progress with treatment plan: \_\_\_\_\_  
 7.8 Are patient's symptoms related to drug or alcohol abuse?  Yes  No  
 If yes, is patient enrolled in a substance abuse program?  Yes  No If yes, state facility: \_\_\_\_\_  
 7.9 Has your patient ever been enrolled in a substance abuse program?  Yes  No If yes, state when: \_\_\_\_\_

**8. Return to work plans**

- 8.1 Prognosis for improvement or recovery: \_\_\_\_\_  
 8.2 Expected date patient will return to their own occupation: \_\_\_\_\_  
 8.3 If unknown, please indicate the next follow up date: \_\_\_\_\_  
 8.4 If your patient is unable to return to their own occupation, please specify when and under what circumstances they could return to modified duties or gradual return to work: \_\_\_\_\_  
 8.5 Have return to work time lines been discussed with the patient?  Yes  No  
 8.6 Please elaborate on time frames and patient's response: \_\_\_\_\_

**9. Rehabilitation**

- 9.1 Is patient a suitable candidate for medical rehabilitation services? (i.e. cardiopulmonary program, speech therapy, etc):  Yes  No  
 If yes, please specify: \_\_\_\_\_  
 9.2 Is patient a suitable candidate for vocation rehabilitation?  Yes  No If yes, please specify: \_\_\_\_\_

**10. Comments**

Is there any other information you wish to add that will give us a better understanding of your patient's condition or treatment requirements?  
 \_\_\_\_\_  
 \_\_\_\_\_

**11. Identification of physician**

11.1 Last name and first name (PLEASE PRINT) \_\_\_\_\_ 11.2 Specialty \_\_\_\_\_ License no. \_\_\_\_\_  
 11.3 Address - No., street, suite \_\_\_\_\_ City \_\_\_\_\_ Province \_\_\_\_\_ Postal code \_\_\_\_\_  
 11.4 Telephone no.: ( ) \_\_\_\_\_ Fax no.: ( ) \_\_\_\_\_  
 Signature of physician: \_\_\_\_\_ Date: \_\_\_\_\_



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## INITIAL ATTENDING PHYSICIAN'S STATEMENT MUSCULO-SKELETAL FORM

- A** PLEASE PRINT.
- B** PART 1 to be completed by patient.
- C** PART 2 to be completed by physician.
- D** Any charge for completion of this form is the patient's responsibility.

### PART 1 - Identification of patient

Last name and first name (PLEASE PRINT) \_\_\_\_\_  
 Policy or group or contract no. 641028 Certificate or identification no. \_\_\_\_\_ Date of birth \_\_\_\_\_

### PART 2 - Attending physician's statement

It is very helpful in facilitating a timely comprehensive informed adjudication decision to have your full clinical notes from the date of disability and any consultation reports for our review. Please include or indicate reasons for not including the requested information.

#### 1. Diagnosis

- 1.1 Primary: \_\_\_\_\_
- 1.2 Secondary: \_\_\_\_\_
- 1.3 Date symptoms first appeared: \_\_\_\_\_
- 1.4 Date patient's condition first prevented them from working: \_\_\_\_\_
- 1.5 Date of first visit for treatment or consultation: \_\_\_\_\_
- 1.6 Has patient ever had the same or similar condition?  Yes  No  Unknown If yes, state when and describe: \_\_\_\_\_
- 1.7 Is condition a result of an injury due to an accident?  Yes  No If yes, please describe: \_\_\_\_\_
- 1.8 Current height: \_\_\_\_\_ Current weight: \_\_\_\_\_ Weight loss/gain to date: \_\_\_\_\_
- 1.9 Is condition due to injury or sickness arising out of patient's employment?  Yes  No  Unknown  
 If yes, have Worker's Compensation/CNESST forms been completed?  Yes  No
- 1.10 Date of latest visit: \_\_\_\_\_
- 1.11 Frequency of visits:  Weekly  Monthly  Other (specify): \_\_\_\_\_
- 1.12 Date of hospital inpatient admission: \_\_\_\_\_
- 1.13 Date of discharge: \_\_\_\_\_
- 1.14 Date of hospital outpatient admission: \_\_\_\_\_
- 1.15 Name of hospital: \_\_\_\_\_
- 1.16 Other treating physicians: \_\_\_\_\_
- 1.17 Pending referrals to specialists: \_\_\_\_\_

#### 2. Studies

Please outline all objective studies performed/scheduled (X-rays, laboratory data, CT scans, etc.) and attach copies of each report.

Date	Procedure	Results

### 3. Symptoms and signs

Please indicate the nature and severity of the patient's symptoms and signs.

	Please specify location(s) and physical findings	Severe	Moderate	Mild	Absent
Pain		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deformity		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Muscle spasm		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Muscle atrophy		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loss of tendon reflexes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sensory change		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motor deficit		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Straight leg raising limitation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Range of motion limitation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (specify)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If arthritic condition:  In remission  Continuously active  Stable  Seasonally active  Intermittently active  Progressive

If fracture:  Closed  Depressed  Open  Compressed  Comminuted

### 4. Nature of treatment

- 4.1 Medications (dose, frequency, date prescribed): \_\_\_\_\_
- 4.2 Physiotherapy (type, frequency, dates): \_\_\_\_\_
- 4.3 Surgery date (past): \_\_\_\_\_ Surgery date (future): \_\_\_\_\_
- 4.4 Other treatment: \_\_\_\_\_
- 4.5 Is patient compliant with prescribed measures?  Yes  No If no, please explain: \_\_\_\_\_

### 5. Restrictions and limitations

		HOURS AT ONE TIME TOTAL					HOURS DURING THE DAY				
		< 1	< 1-2	< 2-4	4-6	6-8	< 1	< 1-2	< 2-4	4-6	6-8
5.1 Stand	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.2 Walk	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.3 Walk on uneven surfaces	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.4 Sit	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.5 Drive	<input type="checkbox"/> No restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6 This patient can lift/carry a maximum of:	kgs	0	5	9	14	18	23	27	32	36	41+
	lbs	0	10	20	30	40	50	60	70	80	90+
5.7	<input type="checkbox"/> No restriction <input type="checkbox"/> Repetitively: how much? <input type="checkbox"/> Occasionally: how much?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5.8 Please indicate in the space provided if this patient is able to perform the following actions: Frequently (F), Occasionally (O), or Not at all (N):  
 Drive:      Bend:      Squat:      Kneel:      Climb:      Reach (above shoulders):      Reach (below shoulders):

### 6. Prognosis and return to work plans

- 6.1 Prognosis for recovery: \_\_\_\_\_
- 6.2 Expected date patient will return to their own occupation: \_\_\_\_\_
- 6.3 If unknown, please indicate the next follow up date: \_\_\_\_\_
- 6.4 If your patient is unable to return to their own occupation, please specify when and under what circumstances they could return to modified duties or gradual return to work: \_\_\_\_\_
- 6.5 Have return to work time lines been discussed with the patient?  Yes  No
- 6.6 Please elaborate on time frames and patient's response: \_\_\_\_\_

### 7. Progress

- 7.1 Has patient:  Recovered  Improved  Not improved  Retrogressed
- 7.2 Current status:  Ambulatory  House confined  Bed confined  Hospital confined

**8. Assessment and treatment are complicated by: (please select and explain in the space provided below)**

- 8.1  Significant emotional or behavioural disorder such as depression, anxiety, etc.
- 8.2  Exaggeration, inconsistent findings, subjective complaints out of proportion to objective findings, bizarre or contradictory observations.
- 8.3  Work related issues (please describe if known): \_\_\_\_\_
- 8.4  Substance abuse: \_\_\_\_\_
- 8.5  Other (please describe): \_\_\_\_\_

**9. Rehabilitation**

- 9.1 Is patient a suitable candidate for medical rehabilitation services?  Yes  No
  - 9.2 Is patient a suitable candidate for vocation rehabilitation?  Yes  No
- if yes to either of the above, please specify: \_\_\_\_\_

**10. Comments**

Is there any other information you wish to add that will give us a better understanding of your patient's condition or treatment requirements?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**11. Identification of physician**

11.1 Last name and first name (PLEASE PRINT)		11.2 Specialty	License no.	
11.3 Address - No., street, suite		City	Province	Postal code
11.4 Telephone no.: (       )       .		Fax no.: (       )       .		
Signature of physician:			Date:	



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## INITIAL ATTENDING PHYSICIAN'S STATEMENT CARDIAC FORM

- A** PLEASE PRINT.
- B** PART 1 to be completed by patient.
- C** PART 2 to be completed by physician.
- D** Any charge for completion of this form is the patient's responsibility.

### PART 1 - Identification of patient

Last name and first name (PLEASE PRINT)	Policy or group or contract no. 641028	Certificate or identification no.	Date of birth
---	---	-----------------------------------	---------------

### PART 2 - Attending physician's statement

It is very helpful in facilitating a timely comprehensive informed adjudication decision to have your full clinical notes from the date of disability and any consultation reports for our review. Please include or indicate reasons for not including the requested information.

#### 1. Diagnosis (including complications) - If psychiatric, give DSM-IV code.

- 1.1 Primary: \_\_\_\_\_
- 1.2 Secondary: \_\_\_\_\_
- 1.3 Date symptoms first appeared: \_\_\_\_\_
- 1.4 Date patient's condition first prevented them from working: \_\_\_\_\_
- 1.5.1 Date of first visit: \_\_\_\_\_ 1.5.2 Date of latest visit: \_\_\_\_\_
- 1.6 Frequency of visits:  Weekly  Monthly  Other (specify): \_\_\_\_\_
- 1.7.1 Date of in-patient admission: \_\_\_\_\_ 1.7.2 Date of discharge: \_\_\_\_\_
- 1.8 Date of out-patient treatment: \_\_\_\_\_
- 1.9 Name of hospital: \_\_\_\_\_
- 1.10 Subjective symptoms (including severity/frequency/duration): \_\_\_\_\_

#### 2. Findings

- 2.1  Chest pain of cardiac origin:  Syncope  Fatigue  Dyspnea due to vascular congestion or hypoxia  Psychophysiologic  
 Other (please specify): \_\_\_\_\_
- 2.2 BP readings over the last 6 months (including dates): \_\_\_\_\_
- 2.3 Current height: \_\_\_\_\_ Current weight: \_\_\_\_\_ Weight loss/gain to date: \_\_\_\_\_
- 2.4 Current status:  Stable  Improving  Regressing

#### 3. Laboratory tests (completed/scheduled) - Please include copies of relevant test results.

- a) EKG: \_\_\_\_\_ e) Blood test: \_\_\_\_\_
- b) Echocardiogram: \_\_\_\_\_ f) X-rays: \_\_\_\_\_
- c) Stress thallium test: \_\_\_\_\_ g) Angiogram: \_\_\_\_\_
- d) Pulmonary function test: \_\_\_\_\_

#### 4. Treatment

- 4.1 Medications (dose, frequency, date prescribed): \_\_\_\_\_
- 4.2 Other (please describe): \_\_\_\_\_
- 4.3.1 Surgery date (past): \_\_\_\_\_ 4.3.2 Surgery date (future): \_\_\_\_\_
- 4.4 Other treating physicians: \_\_\_\_\_
- 4.5 Is patient compliant with prescribed treatment?  Yes  No If no, please explain: \_\_\_\_\_
- 4.6 Has your patient been enrolled in a cardiac rehabilitation program?  Yes  No If yes, provide details: \_\_\_\_\_

**5. Restrictions and limitations**

5.1 Functional capacity: (Canadian Cardio-Vascular Society (CCS))

- Level 1 (no limitation)    Level 2 (mild impairment)    Level 3 (moderate impairment)    Level 4 (severe impairment)

5.2 Functional capacity:

Lifting/Carrying	<input type="checkbox"/> 1-10 (0.5 - 4.5 kg) <input type="checkbox"/> 11-20 (5.0 - 9.1 kg) <input type="checkbox"/> 21-50 (9.5 - 22.7 kg)	Frequency: _____ Duration: _____
Pushing/Pulling	<input type="checkbox"/> 1-10 (0.5 - 4.5 kg) <input type="checkbox"/> 11-20 (5.0 - 9.1 kg) <input type="checkbox"/> 21-50 (9.5 - 22.7 kg)	Frequency: _____ Duration: _____
Standing: _____ hours Walking: _____ blocks		Frequency: _____ Duration: _____
Driver's license revoked: <input type="checkbox"/> Yes <input type="checkbox"/> No		

5.3 What specific restrictions or limitations prevent the patient from performing the duties of his/her occupation? \_\_\_\_\_

5.4 How does this affect the patient's ability to perform activities of daily living? \_\_\_\_\_

**6. Return to work plans**

6.1 Prognosis for medical recovery: \_\_\_\_\_

6.2 Expected date patient will return to their own occupation: \_\_\_\_\_

6.3 If unknown, please indicate the next follow up date: \_\_\_\_\_

6.4 If your patient is unable to return to their own occupation, please specify when and under what circumstances they could return to modified duties or gradual return to work: \_\_\_\_\_

**7. Assessment and treatment are complicated by: please select and explain in the space provided below.**

- 7.1  Significant emotional or behavioural disorder such as depression, anxiety, etc.
- 7.2  Exaggeration, inconsistent findings, subjective complaints out of proportion to objective findings, bizarre or contradictory observations
- 7.3  Work-related issues (please describe if known): \_\_\_\_\_
- 7.4  Substance abuse
- 7.5  Other (please describe): \_\_\_\_\_

**8. Progress**

- 8.1 Has patient:  Recovered    Improved    Not improved    Retrogressed
- 8.2 Current status:  Ambulatory    House confined    Bed confined    Hospital confined

**9. Rehabilitation**

- 9.1 Is patient a suitable candidate for medical rehabilitation services? (i.e. cardiopulmonary program, speech therapy, etc):  Yes    No  
If yes, please specify: \_\_\_\_\_
- 9.2 Is patient a suitable candidate for vocation rehabilitation?  Yes    No   If yes, please specify: \_\_\_\_\_

**10. Comments**

Is there any other information you wish to add that will give us a better understanding of your patient's condition or treatment requirements?  
\_\_\_\_\_  
\_\_\_\_\_

**11. Identification of physician**

11.1 Last name and first name (PLEASE PRINT)	11.2 Specialty	License no.
11.3 Address - No., street, suite	City	Province
		Postal code
11.4 Telephone no.: (       )       -	Fax no.:       (       )       -	
Signature of physician:	Date:	



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## INITIAL ATTENDING PHYSICIAN'S STATEMENT CANCER FORM

- A** PLEASE PRINT.
- B** PART 1 to be completed by patient.
- C** PART 2 to be completed by physician.
- D** Any charge for completion of this form is the patient's responsibility.

### PART 1 - Identification of patient

Last name and first name (PLEASE PRINT)	Policy or group or contract no 641028	Certificate or identification no	Date of birth
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### PART 2 - Attending physician's statement

It can be very helpful in facilitating a timely comprehensive informed adjudication decision to have your full clinical notes from the date of disability and any consultation reports for our review. Please include or indicate reasons for not including the requested information.

#### 1. Diagnosis (including any complications) - Please attach a copy of all consultation, operative and pathology reports.

- 1.1 Date of cancer diagnosis: \_\_\_\_\_
- 1.2 Site of the tumour: \_\_\_\_\_
- 1.3 Type of tumour: \_\_\_\_\_
- 1.4 Histology and staging: \_\_\_\_\_

#### 2. History

- 2.1 Date symptoms first appeared: \_\_\_\_\_
- 2.2 Has this patient ever had same or similar condition?  Yes  No  Unknown  
 If yes, please specify diagnosis and dates of treatment: \_\_\_\_\_
- 2.3 Describe current symptoms: \_\_\_\_\_
- 2.4 First visit for these symptoms: \_\_\_\_\_
- 2.5 Current height: \_\_\_\_\_ Current weight: \_\_\_\_\_ Weight loss/gain to date: \_\_\_\_\_
- 2.6 In your opinion, when did the patient's condition first prevent them from working? \_\_\_\_\_

#### 3. Treatment

- 3.1 Date of first visit: \_\_\_\_\_
- 3.2 Date of latest visit: \_\_\_\_\_
- 3.3 Frequency of visits:  Weekly  Monthly  Other (specify): \_\_\_\_\_
- 3.4 Treatment - Include information on all treatments to date and future treatment plan, inclusive of:
  - a) Surgery: \_\_\_\_\_
  - b) Radiation: \_\_\_\_\_
  - c) Hormones: \_\_\_\_\_
  - d) Chemotherapy: \_\_\_\_\_

#### 4. Hospitalization (if applicable for this illness or injury)

- 4.1 Date of in-patient admission: \_\_\_\_\_
- 4.2 Date of discharge: \_\_\_\_\_
- 4.3 Date of out-patient treatment: \_\_\_\_\_
- 4.4 Name of hospital: \_\_\_\_\_



**5. Therapies**

5.1 Describe the therapies to date:  N/A  Partial  Complete

5.2 Describe all co-morbid conditions: \_\_\_\_\_

5.3 Describe any post therapy sequelae: \_\_\_\_\_

5.4 Please provide the patient's prognosis for improvement and/or recovery: \_\_\_\_\_

5.5 Is the condition due to injury or sickness arising out of the patient's employment?  Yes  No

**6. Patient's current physical abilities**

6.1 Please indicate your patient's current physical abilities:

- Sedentary duties: Mainly sitting, occasional walking and standing, and possible lifting of 5 kg or less.
- Light duties: Frequent handling of loads of up to 5 kg, sometimes up to 11 kg, may require frequent walking or standing, or sitting with a degree of pushing and pulling of arm and/or leg controls.
- Medium duties: Frequent handling of loads up to 11 kg, sometimes up to 23 kg. Frequent lifting, carrying, pushing and pulling may also be required.
- Heavy duties: Frequent handling of loads up to 23 kg, sometimes up to 45 kg.

6.2 In your opinion, what is the earliest date your patient will be able to return to work? \_\_\_\_\_

6.3 If the previous job could be modified, when could rehabilitation employment commence? \_\_\_\_\_

**7. Comments**

7.1 Please provide the names of other physicians who have been/will be involved in assessing the medical problems and copies of any available consultation reports: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7.2 We would appreciate any additional comments that would help us to better understand your patient and their condition: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**8. Identification of physician**

8.1 Last name and first name (PLEASE PRINT)	8.2 Specialty	License no.	
8.3 Address - No., street, suite	City	Province	Postal code
8.4 Telephone no.: ( ) -	Fax no.: ( ) -		
Signature of physician:	Date:		