

Group Disability

Claim Statement Package

This package is to be used to file a claim under a Group Disability policy. Failure to complete this form and all parts may result in delay of processing the claim. The following forms are included:

Claim Fraud Statements	
Group Disability – Employee Claim Statement	
Authorization for the Use and/or Disclosure of Information	
Authorization for Release of Claim Information (Optional)	
Group Disability – Employer Statement	
Group Disability – Attending Physician Statement	

At Pacific Life, we are here to support you during the claims process. If you have any questions about this form or the required documentation, please reach out to us at (855) 810-3301 between 5 a.m. and 5 p.m., Pacific Time.

Additionally, you can consult your Certificate of Insurance and Schedule of Benefits for detailed information about your coverage. Keep in mind that there are specific rules — referred to as Limitations and Exclusions — that may apply during the claim evaluation. The information you provide in this claim package will be carefully reviewed to determine your eligibility for benefits.

Claim Submission Instructions:

- 1. Review the **Claim Fraud Statements** form for the state in which you reside and the state in which your policy was issued.
- Complete the Group Disability Employee Claim Statement and the Authorization for the Use and/or
 Disclosure of Information. The Authorization for Release of Claim Information is an optional form should
 you wish to authorize an individual to have access to your claim information.
- 3. Have your employer complete the **Group Disability Employer Statement**.
- 4. Have your treating physician complete the **Group Disability Attending Physician Statement**. In addition, provide hospital discharge summaries and/or medical records which support your claim.
- 5. Return documents to us at:
 - Email: claims.workforcebenefits@pacificlife.com
 - Mail: Pacific Life & Annuity Company, Attn: Workforce Benefits Claims, PO Box 2387, Omaha, NE 68103-2387
 - Fax: (949) 219-8872



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Claim Fraud Statements

Please read the warning for your state.

General Fraud Warning: Any person who knowingly presents a false statement in a claim for insurance may be guilty of a criminal offense and subject to penalties under state law. (Not applicable in Virginia)

The laws of each state listed below require us to furnish you with the notice indicated below.

Arizona: For your protection Arizona law requires the following statement to appear on this form. Any person who knowingly presents a false or fraudulent claim for payment of a loss is subject to criminal and civil penalties.

California: For your protection, California law requires the following disclosure: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

District of Columbia: WARNING: It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits, if false information materially related to a claim was provided by the applicant.

Florida: Any person who knowingly and with intent to injure, defraud or deceive any insurer, files a statement of claim or an application containing any false, incomplete, or misleading information is guilty of a felony of the third degree.

Kentucky: Any person who knowingly, and with intent to defraud any insurance company or other person files a 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.

Maryland: Any person who knowingly or willfully presents a false or fraudulent claim for payment of a loss or benefit **or** who knowingly **or** willfully presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

New Jersey: Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.

New Mexico: ANY PERSON WHO KNOWINGLY PRESENTS A FALSE OR FRAUDULENT CLAIM FOR PAYMENT OF A LOSS OR BENEFIT OR KNOWINGLY PRESENTS FALSE INFORMATION IN AN APPLICATION FOR INSURANCE IS GUILTY OF A CRIME AND MAY BE SUBJECT TO CIVIL FINES AND CRIMINAL PENALTIES.

New York: 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, and 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.

Pennsylvania: 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 and subjects such person to criminal and civil penalties.

Washington: It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties may include imprisonment, fines and denial of insurance benefits.



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Group Disability - Employee Claim Statement

Section 1: Employee Inform	ation									
First Name: MI: L			Last Na	me:						Suffix:
, , , , , , , , , , , , , , , , , , , ,					al Status: ngle □ Married □ Domestic Partnership parated □ Divorced □ Widowed					ich you work:
Address:	,		Cit	y:				State:	ZIP:	
Preferred Phone Number:	Email A	ddress:	, I							
Section 2: Employment Info	rmation									
Employer Name:									□s	elf-employed
Employer Address:			Cit	y:				State:	ZIP:	
Job Title:	ription:									
Do you work for any other emplo	yer? 🛘 Yes	□ No If	yes, plea	se provide	employer	contact ir	nformatio	n:		
Last Day Worked (mm/dd/yyyy):	Nu	ımber of ho	ours worl	ked on last	□ Ac					xpected .ctual Inknown
Section 3: Event Informatio	n - Pregnan	cy/Injury	/Sickne	SS (Check t	he approp	riate box a	and compl	ete the applic	able section.)
Diagnosed Condition(s):										
First Treatment Date (mm/dd/yyyy)		Last Offic	ce Visit <i>(n</i>	nm/dd/yyyy):			Next Offi	ice Visit (mm/c	dd/yyyy):	
☐ Pregnancy										
Expected Delivery Date (mm/dd/yy	yy): Actual [Delivery Dat	te (mm/da						there complications?	
Were there any complications whilf yes, please provide a detailed e									nder the poli	cy.)
☐ Injury										
Date of Injury (mm/dd/yyyy):	Time of Injui	ry (estimate if	f <i>unknown,</i> □ a.m □ p.m	. □ Moto		y occur? (s Accident		☐ Lifting/Pu	shing/Pullin	g 🗖 Other
Briefly describe what happened.	(Please attach a	copy of the a			report if ap	plicable.)				
Is this considered the result of a If a Workers' Compensation clain								aim been filed	d? □ N/A	□ Yes □ No



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Group Disability - Employee Claim Statement (continued)

First Name:	MI:	Last Name:		Suffix:
Section 3: Event Information - Pregnand —	y/Injury	//Sickness (continued)		
☐ Sickness	l fau aba a		TVee DNe	
Were you previously diagnosed with, or treated of the second of the seco			⊒ Yes □ NO	
Facility/Hospitalization Information (check all that	apply):			
☐ Urgent Care ☐ Emergency Room ☐ Sur	gical Cent	er 🛘 ICU 🗘 Hospital (🗘	Inpatient / D Outpatient)	
Facility/Hospital Name:				
Address:	City:	State:	ZIP:	
Phone Number:		Fax Number:		
If confined to a facility/hospital, provide the dat	es of con	finement:		
Admit (mm/dd/yyyy) Dis	scharge (n	nm/dd/yyyy)	Duration Includes of	onfinement in an ICU
Surgery/Procedure Date (mm/dd/yyyy): □ N/A	Surgery	Procedure(s) Performed:		
Please provide your treating provider's informa Treating Provider Name: Address:	City:			
Phone Number:		Fax Number:		
Section 5: Tax Information				
Approved benefits may be taxable. Would you l			_	
Federal Income Tax Withholding:				
State Income Tax Withholding:			OR	
Please Note: Taxes will <u>not</u> be withheld if bene minimum amount required.	fits are no	ot taxable. If your employer in	forms us benefits are taxable, v	we will withhold the
Section 6: Attestation and Signature				
 The answers provided in this Statement are I have read and understand the information I understand that I may consult with an indefinancial, tax, or legal advice or recommend 	n in the Cl	aim Fraud Statements section		provide me with any
Signature:			Date Signed:	



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Authorization for the Use and/or Disclosure of Information

Claimant/Employee/Retiree Name:	DOB:
I authorize the use and disclosure of the following information named individual.	so that Pacific Life & Annuity Company can evaluate the insurance claim on the above-
1. This authorization applies to the following information (whether from before, during or after the date of this authorization):
communicable or sexually transmitted diseases, mental health substance use disorder, and/or genetic information. Additional records and reports; investigative reports; accident reports by I	e medical records include such information, information about HIV status, AIDS, other (other than "psychotherapy notes" that are kept separate from the medical record), any ly, workers compensation information; postmortem examination, autopsy, toxicology aw enforcement; paramedics records; employment incident reports; incident reports of s records; financial and employment related information; and information regarding amounts and entitlement dates.
${\bf 2.}\ {\bf I}$ authorize the following persons (or class of persons) to	make the authorized use and/or disclosure of this information:
medical examiner's offices, coroner's offices, health plans, insudepartments, government agencies and entities (including to be	nacies, emergency medical service agencies and all other medically related providers; rance companies, third party administrators, law enforcement agencies, public safety ut not limited to federal, state, local and Social Security Administration), insurance ional licensing bodies, consumer reporting agencies, reinsurers, employers, attorneys,
${\bf 3.I}$ authorize the following persons (or class of persons) to	receive this information:
Pacific Life & Annuity Company and its parent company.	
4. Purpose of proposed use or disclosure:	
For purposes of Pacific Life & Annuity Company evaluating and	administering insurance claims.
5. I authorize Pacific Life & Annuity Company to share this \boldsymbol{i}	information with:
	ities under any benefit plan for the purpose of reporting claim status or experience, or ns payment, administrative, or audit functions related to any benefit, plan or claim.
6. This authorization expires:	
One year after the date of signature.	
REFUSAL TO SIGN:	
	r or health plan may not condition treatment, payment, enrollment, or eligibility for health ation. Your failure to sign this authorization, however, may result in Pacific Life & Annuity
REDISCLOSURE:	
	it may no longer be subject to federal and state law and may be subject to redisclosure. mation in accordance with its privacy policy and other applicable law. For more information, policies/our-privacy-promise.html
REVOCATION:	
	ust be in writing, signed by you or on your behalf, and delivered to Pacific Life & Annuity on will not be effective to the extent that health care providers or health plans have already
COPY OF AUTHORIZATION	
You may request a copy of this authorization.	AUTHORIZATION
I understand and agree to the foregoing:	AUTHORIZATION
Signature Date	
Print Name	Signature of Individual or Personal Penrsonatative Date
If signing as legal representative, describe your authority:	Printed name of Personal Representative
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Supporting Documentation must be attached.

(e.g. LEGAL GUARDIAN, EXECUTOR, ADMINISTRATOR, OR NEXT-OF-KIN)



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Authorization for Release of Claim Information I authorize Pacific Life & Annuity Company to release information regarding the following individual: Claimant/Employee Name _____ (First) (Last) (Suffix) Date of Birth (mm/dd/yyyy) _____ Social Security Number ____ I authorize release of medical, claim, benefit, and financial information relating to insurance benefits for the above identified individual, unless otherwise specified: Information is to be released to the following named party for the purpose of assisting with the insurance claim of the above identified individual: Name of Company or Individual: ______ Address: ______ St: ____ St: ____ SIP: _____ Telephone: ______ Email: _____ This authorization will remain valid during the claim(s) duration, but not for more than one year from the date signed. I can revoke this authorization at any time by providing written notice for Pacific Life & Annuity Company by email, mail, or fax. I understand that to the extent that information has been previously released, such revocation may not be effective. **Email:** claims.workforcebenefits@pacificlife.com Mail: Pacific Life & Annuity Company Attn: Workforce Benefits - Claims PO Box 2387 Omaha, NE 68103-2387 (949) 219-8872 Fax: Date _____ Print Name _____

First, MI, Last, Suffix (Include Title/Capacity and documentation, if applicable)



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Group Disability - Employer Statement

Section 1:	Employ	er Informat	ion							
Employer Na	ame:						E	mployer Telepho	one Number:	
Employer Ac	ldress:				City:			State:	ZIP:	
Section 2:	Employ	ee Informa	tion							
First Name:				MI: Lá	st Name:					Suffix:
Employee Ad	ddress:				City:			State:	ZIP:	
Social Securi	ity Numl	per:	mployee Pho	ne Number		Employee Email A	ddress:			
Date of Hire	(mm/dd/y	<i>yyyy</i>): Job Ti	tle:							
Job Descripti	ion and	Physical Requi	rements: (Attac	h written desc	ription if av	ailable.)				
		1	_							
	N/A	Occasionally	Frequently	/ Continu	ously		N/A	Occasionally	Frequently	Continuously
Sit						Walk				
Stand						Drive				
		Lift/Ca	rry			Reach Above				
0-10 lbs						Bend/Stoop				
10-20 lbs						Twist				
20-50 lbs						Push/Pull				
50-100 lbs						Fine Manipulation				
> 100 lbs						Stress Level	Low [☐ Moderate ☐	High 🛮 Ve	ery High
						minated - as of (mm/a	dd/yyyy):			
		Full Time		•			_	_		
				uesday L	I Wednesd	lay 🗖 Thursday 🗖	ے Frida	y □ Saturday		
		e Informati								
Last Day Wo	rked (mn	n/dd/yyyy): H	ours Worked o	n Last Day:	Return to	o Work Date (mm/dd/y	<i>yyy)</i> : [☐ Expected ☐ /	Actual 🗖 Un	known
								☐ Full Time ☐ I	Part Time - hrs	s/wk:
	Is the condition considered work-related?									
	Has a workers' compensation claim been filed? 🗖 Yes 🔲 No 🔲 Expected									
If a workers'	If a workers' compensation claim has been filed, please provide carrier, contact, and claim information:									
Sick Leave Ex	xhauste	d on <i>(mm/dd/yy</i> y				ified/accommodated			ions? 🗖 Yes	□ No
			ii yes, cor	itact Name:				Contact Phone:		



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Group Disability - Employer Statement (continued)

First Name:		MI:	Last Name:			Suffix:				
Section 4: Financial Infor	mation									
a) Premiums and Deductions										
What percentage of disability	premiums are pai	d by the e	employee?	N/A (All disability pre	miums are paid by the employer	:.)				
Short Term Disability:%										
Long Term Disability:%										
Pre-tax Withholdings:	Pre-tax Withholdings:									
Retirement Savings Plan% Pre-tax Medical and Other Insurance \$ per										
Is the employee subject to: 5 b) Salary	Social Security Tax	es 🗆 Yes	s □ No	Medicare Taxes	Yes No					
Payment Frequency: Hour	·ly □ Weekly □] Bi-Week	ly 🗖 Semi-Mon	thly 🗖 Monthly	☐ Yearly					
Base Salary (excluding bonus,	overtime, or com	missions)	:\$							
Total Bonus and Commission	s over the last 24 r	months: \$								
Effective Date of Last Salary C										
If the earnings definition is ba	· -	=		•	_	•				
\$	_ From (mm/dd/yyy	/y):		Through <i>(mm.</i>	/dd/yyyy):					
c) Other Income				6.11						
Please indicate if the employe	ee is receiving or e	eligible to	receive any of the	_						
			Amount	Frequency	Begin Date (mm/dd/yyyy)	End Date (mm/dd/yyyy)				
Sick Leave	☐ Yes ☐ No	\$								
Workers' Compensation	☐ Yes ☐ No	\$								
Salary Continuance	☐ Yes ☐ No	\$								
State Disability	☐ Yes ☐ No	\$								
Paid Family Medical Leave	☐ Yes ☐ No	\$								
Other Group Disability	☐ Yes ☐ No	\$								
Other	☐ Yes ☐ No	\$								
Section 5: Authorized Em	ıployer Contact	: - Inforn	nation and Sig	nature						
Fraud Warning: Any pe						ding information is				
subject to criminal and	civil penalties.	This inc	ludes Employ							
Employer Contact Name:				Job Tit	le:					
Contact Phone Number:		Contact	Email Address:							
Signature:		•		Date S	igned:					



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Group Disability - Attending Physician Statement

Section 1: Patient Information									
First Name:	MI: Last Name:				Suffix:	Date of Birth (mm/dd/yyyy):			
Castina 2. Batinata Madical Co.	م ماند: ماند								
Section 2: Patient's Medical Condition and Event Information									
Diagnosis(es):	ICD Code(s):								
☐ Pregnancy									
Expected Delivery Date (mm/dd/yyyy):		Actual Delivery Date (n	om/dd/www).		Delivery Type	<u> </u>			
Expected Delivery Date (Illinadayyyy).		recedir belivery bate (iii	mnaaryyyy).		□ Vaginal [
Were there complications which prev If yes, please provide a detailed expla									
□ Injury				1					
Please indicate the type of accident: MVA Fall Lift/Push/Pull	☐ Other _			Is the curre	nt condition the result of a work-related injury? No				
☐ Sickness									
Has your patient has been treated for If yes, please provide condition(s) and	the same I treatmen	eor similar condition(s) it dates (mm/dd/yyyy):	in the past?	□ Yes □	No				
First Treatment Date (mm/dd/yyyy):	Did	you advise your patient	t to stop wo	rking? \square Ye	s 🗖 No				
		es, as of what date (mm/e	•	_					
Last Office Visit (mm/dd/yyyy): Hei		t/BP as of Last Office Vi			Nex	kt Office Visit (mm/dd/yyyy):			
				. ,					
Facility/Hospitalization Information (c		in W:	_105	·/					
☐ Urgent Care ☐ Emergency Room Facility/Hospital Name:] Hospital (l	□ Inpatient /	'□ Outpatient)				
Address:		City:	St	ate:	ZIP:				
Phone Number:		Fax Numb	er:						
If confined to a facility/hospital, provi	de the dat	es of confinement:							
Admit (mm/dd/yyyy)		Dis	scharge <i>(mm</i>	/dd/yyyy)					
Surgery/Procedure Date (mm/dd/yyyy):	N/A	Surgery/Procedure(s) P	erformed (I	ncude CPT C	odes):				



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Group Disability - Attending Physician Statement (continued)

First Name:	MI:	Last Name:		Suffix:			Birth (mm/dd/yyyy):		
Section 3: Treatment Plan									
Provide your treatment pla	n including expect	ed duration, frequenc	cy of visits, prescrib	ed medica	tion, etc.:				
Released to Return to Worl	<pre>< (mm/dd/yyyy):</pre>								
		□ Cura a stard Dalara	an D Artual Dala	П D-	Janaari with De		a. Dillinkin avvin		
		· · · · · · · · · · · · · · · · · · ·	se 🗖 Actual Rele						
If your patient has ongoing specific restrictions and the		nitations preventing	their return to worl	k or has be	en released w	ith restric	tions, please provide		
specific restrictions and the	eir duration.								
Expected Duration of Restr	ictions: From (mm	n/dd/yyyy)	Throu	gh (mm/dd/	yyyy)				
If your patient was referred	to you by another	nrovider or referred	from you to anoth	ner provide	r nlease inclu	de the nr	ovider's information		
□ N/A			Till you to anoth	ici provide	ir, picase iricia	ac tric pr	ovider 3 imormation.		
	Physician Name:				Specialty:				
☐ TO you from:									
☐ FROM you to:	Address:		City:	Sta	to.	ZIP:			
	Addi ess.		City.	211.					
	Phone Number:		Fax Number:						
Fraud Warning: Any	person who kn	owingly files a sta	atement of clair	n contair	ning false o	r mislea	ading information is		
subject to criminal an									
Physician Name:	•		0,	Specialty					
TriySician realise.				Specialty	•				
Address:			City:		Stat	:e:	ZIP:		
Dis a see Alexandre and		Face Normals and			Discosi si sa Tasa	ID:			
Phone Number:		Fax Number:		Physician Tax ID:					
Physician Signature:		1		Date Sign	ned:				
, , , , , , , , , , , , , , , , , , , ,						2 3.5 3.633.			