

**INFORMATION SHEET**

# Claim Checklist

Please ensure you provide completed copies of the documents below relevant to your claim when sending us your application.

| Income Protection Claim                                     | Total and Permanent Disablement Claim                            | Terminal Illness Claim                                      |
|---|--|---|
| <input type="checkbox"/> Claiming my insurance form         | <input type="checkbox"/> Claiming my insurance form              | <input type="checkbox"/> Claiming my insurance form         |
| <input type="checkbox"/> Medical practitioner report        | <input type="checkbox"/> Medical practitioner report             | <input type="checkbox"/> Medical practitioner report        |
| <input type="checkbox"/> Medical specialist report*         | <input type="checkbox"/> Medical specialist report               | <input type="checkbox"/> Medical specialist report          |
| <input type="checkbox"/> Copies of relevant medical reports | <input type="checkbox"/> Copies of relevant medical reports      | <input type="checkbox"/> Copies of relevant medical reports |
| <input type="checkbox"/> Tax file number declaration        | <input type="checkbox"/> Education, training and experience form | <input type="checkbox"/> Most recent bank statement**       |
| <input type="checkbox"/> Most recent bank statement**       | <input type="checkbox"/> Most recent bank statement**            |   |

\* This form is optional to provide at the time you lodge your initial claim form. However if you do provide it with your claim form, it may support your claim assessment outcome. Please note, we may ask you to provide us with this form during the claim process as required.

\*\* We only need the front page of your bank statement. Please ensure this includes your bank's name, your full name, address, account number, BSB number, and the statement issue date.

## Handy hints for making your claim

These handy hints will support you to have a smoother claims process and better enable you to provide us with all the information we need to be able to action your claim request.

### Claiming my insurance form

You will need to complete this form with any Income Protection, Total and Permanent Disability or Terminal Illness claim.

#### Don't forget:

- ☐ Providing your Proof of Identity (POI) is not required to make a claim, it is required for the payment of a TPD or TI claim (once approved), so while you are at your doctor next ask them to certify your drivers license or passport so you can submit this with your claim.
- ☐ You also need to supply us with a copy of your most recent bank statement, confirming the same BSB, account number and full name.
- ☐ Include your manager's full name, job title, phone number and email address in Section 5 of this form.
- ☐ You must sign the claim form.

## Medical practitioner report

This report is for your medical practitioner (usually a GP) to provide us with information about your diagnosis, treatment and your capacity for work.

### Don't forget:

- ☐ This form is usually completed by your GP. Take it to your next GP visit and ask them to fill it in on your behalf, this is also a good time to get your drivers license or passport certified if you are claiming TPD or TI.
- ☐ If you wish to submit a report from your Psychologist or Physiotherapist, ask them to provide you with a separate report that you can provide with your claim form. (Don't use this one for that purpose).
- ☐ Submit this medical practitioner report completed by your GP, at the same time you lodge your claim form.

## Medical specialist report

The medical specialist report is required when making a claim for TPD or TI but is optional to provide when you lodge an Income Protection claim form (but may increase your initial claim payment period). It is for your medical specialist to provide us with information about your diagnosis, treatment and capacity for work.

### Don't forget:

- ☐ This form is to be completed by medical specialists only (not GPs). You must provide it when you submit a TPD or Terminal Illness claim. We may request it as part of an Income Protection claim.
- ☐ For Income Protection claims, a medical specialist report is not mandatory to provide when you lodge your claim form, but is highly recommended to provide if you have seen a specialist for your condition, as it may support your claim. This may result in an increase to the initial approved payment period.
- ☐ A medical specialist must be registered with AHPRA in the relevant field.

## Copies of any relevant medical reports

### Don't forget:

- ☐ If you provide further information about your injury or condition, this may further support your claim assessment. If you have the following information relevant to your claim, please provide them when you lodge your claim form – list of current medications, specialist reports, test results (eg biopsy/blood), health care plans, Orthopaedic/Radiological reports (eg X-rays/MRI), hospital or separation reports, workers compensation / return to work reports.

## Education training and experience questionnaire

If you are making a TPD claim, you will also need to complete the education training and experience questionnaire form. This is for you to provide us with information about your occupation, education, any rehabilitation programs you have undertaken, and your skills, interests and hobbies.

### Don't forget:


- ☐ Include all the details of your previous experience, employers and duties in Section 2.
- ☐ Complete Section 6 about your interests and hobbies.
- ☐ Sign the member declaration at the end of the form.

## Tax File Number Declaration (only required for Income Protection Claims)


### Don't forget:

- ☐ Complete and submit a completed Tax File Number declaration form if you are lodging an Income Protection claim. If you do not provide us with this completed form we will be required to withhold tax at the top marginal tax rate when your payment is made.


### We're here to help

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