

# Short-Term Disability Claims Checklist

## Have this information handy to identify your policy:

Policy number

Policyholder's name and date of birth

Policyholder's address

## Here's a list of common items you will need to file a claim:

Type of disability: injury, sickness or pregnancy

For injury: description and location

For motor vehicle accident: copy of police report

For hospital stay: Ask your physician to provide a completed UB04 document

Disability Claim Form (Physician's and employer's statements are required.)

*Details of all requirements can be found by downloading your state-approved claim form [here](#).*

## How to file a claim:

**Fax:** 1.877.44.AFLAC (1.877.442.3522)

**Mail:** Aflac, Attention: Claims Department

1932 Wynnton Road, Columbus GA 31999

## Helpful tips: Register on [aflac.com/myaflac](https://www.aflac.com/myaflac) so you can:



### Log in to MyAflac [here](#).

You will need your policy number handy to register.



### View benefit details

Here you'll find a copy of your policy to see what's covered and benefit amounts.



### Sign up for direct deposit and receive benefits faster

Be sure to register at least 24 hours before filing a claim. Otherwise, your check will be mailed to you.



This checklist is intended to assist policyholders when filing claims and does not constitute a guarantee of claims payments. Documentation requirements vary by type of claim; please review requirements for your claim(s) carefully. Processing time is based on business days after all required documentation needed to render a decision is received and no further validation and/or research is required. **Coverage is underwritten by American Family Life Assurance Company of Columbus. In New York, coverage is underwritten by American Family Life Assurance Company of New York.**



# INITIAL DISABILITY CLAIM FORM

Thank you for trusting Aflac with your Initial Disability needs.

> If you are interested in uploading documentation on an existing claim, register using [aflac.com/smartclaim](http://aflac.com/smartclaim).

To prevent delays, please provide documentation from your healthcare provider to support this claim. If you have additional bills or medical documentation that relates to this diagnosis other than the documentation defined, please submit them for review of additional benefits.

- > Service related items can be obtained directly from the patient's healthcare provider(s) by requesting a UB04 hospital bill or HCFA 1500 non-hospital bill.
- > Failure to complete all sections may result in a delay in processing this claim.
- > Disclaimer: Some of the services listed may not be covered by your policy.

\*Policy Number:

**Policyholder Information:** This \* denotes a required field.

\*Last Name  Suffix  \*First Name  MI

\*Date of Birth (mm/dd/yy)  /  /  Telephone Number where we can reach you  -  -

\*Home Address

\*City  \*State  \*Zip Code  -

Check box if this is a permanent address change.

### Patient Information:

\*Last Name  \*First Name  \*Date of Birth (mm/dd/yy)  /  /

\*Sex:  Male  Female

\*Relationship:  Primary Policyholder  Spouse

### Initial Disability Checklist

- Is disability due to a sickness?  No  Yes  
 Is disability due to an injury?  No  Yes  
 • If yes, please complete the following questions related to the injury:  
 • Date of the injury: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 • Describe how the injury occurred: \_\_\_\_\_  
 • Was this disability caused by an incident that occurred while performing the duties of the patient's employment?  No  Yes  
 • Was this a motor vehicle accident in which the patient was the driver?  No  Yes (If yes, please submit a copy of the Police Report)

### For all claims, please complete all remaining sections.

- Was the patient confined to the hospital as a result of this condition?  No  Yes (If yes, please submit the itemized hospital bill, UB04, or HCFA 1500)
- Hospital name: \_\_\_\_\_
- City: \_\_\_\_\_ State: \_\_\_\_\_

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.

\_\_\_\_\_  
POLICYHOLDER/PATIENT SIGNATURE                      FAMILY RELATIONSHIP, IF NOT POLICYHOLDER                      DATE

# INITIAL DISABILITY CLAIM FORM - EMPLOYER'S STATEMENT

\*Policy Number:

**Policyholder Information:** This \* denotes a required field.

\*Last Name  Suffix  \*First Name  MI

\*Date of Birth (mm/dd/yy)  
 /  /

\*Employee's Name (Last Name, Suffix, First Name, MI)

\*Employer's Name/Account #  \*Employer's Phone Number  -  -

\*Employer's Address

\*City  \*State  \*Zip Code  -

- First date of disability: \_\_\_\_/\_\_\_\_/\_\_\_\_
- Was this disability caused by an incident that occurred while performing the duties of his/her employment?  No  Yes
- Prior to this disability, number of hours worked per week: \_\_\_\_\_
- Gross annual income prior to disability: \_\_\_\_\_ **\*Income is subject to verification at time of claim.**  
 Self-employed?  No  Yes (If yes, your gross annual income is the average of your net earnings for the past two years. Please submit tax records for the past two years.)
- Has the employee returned to work?  No  Yes
- If no, expected return to work date: \_\_\_\_/\_\_\_\_/\_\_\_\_ If yes, date returned to work: \_\_\_\_/\_\_\_\_/\_\_\_\_
- If the employee has returned to work is he or she working:  Full-Time  Part-Time  Light Duty  
 If working part time or light duty, please provide the number of working hours per week: \_\_\_\_\_  
 If part-time/light duty, date expected to return to work to full-time: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 If part-time/light duty, is/was the employee earning at least 80% of his/her pre-disability salary?  No  Yes

**Please complete this section only for W-2 Employees and/or Contract 1099. (Please contact payroll and/or check the policyholder's Salary Redirection Agreement/Premium Deduction Authorization card for the answer to these questions.)**

- Are Disability Rider or Short-Term Disability premiums deducted from the policyholder's paycheck on a pre-tax basis?  No  Yes
- Does the employer pay a portion of the disability premium for the policyholder?  No  Yes (If yes, what percent? \_\_\_\_\_%)
- Policyholder is: (Check all that apply.)  Exempt from Social Security  Exempt from Medicare  Subject to RRTA
- Date of hire: \_\_\_\_/\_\_\_\_/\_\_\_\_
- Is the person still employed?  No  Yes
  - If no, last date of employment: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Please note:**

The employer is required to report disability benefits paid on pre-tax plans on Form 941 and the employee's Form W-2.

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\_\_\_\_\_  
 EMPLOYER'S SIGNATURE      EMPLOYER'S PRINTED NAME      TITLE      DIRECT PHONE NUMBER      DATE

American Family Life Assurance Company of Columbus (Aflac)  
 ATTN: Claims Department • 1932 Wynnton Road • Columbus, GA 31999  
 For information or to check claim status, visit aflac.com or call 1-800-99-AFLAC (1-800-992-3522)  
 Claims may be faxed to 1-877-44-AFLAC (1-877-442-3522)

# INITIAL DISABILITY CLAIM FORM - PHYSICIAN'S STATEMENT

\*Policy Number:

Policyholder Information: This \* denotes a required field.

\*Last Name  Suffix  \*First Name  MI

\*Date of Birth (mm/dd/yy)  
 /  /

## Patient Information:

\*Last Name  \*First Name  \*Date of Birth (mm/dd/yy)  /  /

## Physician Information:

\*Phone Number  -  -  \*Fax Number  -  -

\*Physician's Name

\*Address

\*City  State  Zip Code  -

- Primary diagnosis for disability and ICD code: \_\_\_\_\_ Additional diagnoses: \_\_\_\_\_
- If due to an injury, please provide the date and details of the injury: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

- Was this disability caused by an incident that occurred while performing the duties of his/her employment?  No  Yes
- Symptoms first occurred on: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ If diagnosed with cancer, date of initial diagnosis: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- Patient first consulted you for this condition on: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- Was the patient treated for the primary diagnosis by another physician?  No  Yes  
If yes, physician's name: \_\_\_\_\_
- Treating physician's address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**\*If filing for disability within the first two years of the policy, medical records may be requested.**

- Pregnancy claims: Date of delivery: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  Vaginal  Cesarean
- If not delivered, expected delivery date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- Please advise of any complications: \_\_\_\_\_
- First date of disability: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- Date patient was last treated: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- Have you released the patient to return to work?  No  Yes (Date released: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_)  
Patient released to work:  Full Time  Part Time  Light Duty  
If part time/light duty, please provide the date the patient is expected to return to full duty: \_\_\_\_\_
- If patient has not been released, please provide the next appointment date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Please also provide the date of expected release: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- Is patient permanently disabled?  No  Yes (Medical records will be required if permanent disability is indicated; please provide medical records to patient.)

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PHYSICIAN'S SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

TAX ID \_\_\_\_\_

American Family Life Assurance Company of Columbus (Aflac)  
ATTN: Claims Department • 1932 Wynnton Road • Columbus, GA 31999  
For information or to check claim status, visit aflac.com or call 1-800-99-AFLAC (1-800-992-3522)  
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