

May 11, 2022

IMPORTANT CHANGES TO THE LONG TERM DISABILITY (LTD) AND LIFE CLAIM FORMS

We are sending this information on behalf of the Healthcare Benefit Trust (HBT), Joint Community Benefits Trust (JCBT), Joint Facilities Benefits Trust (JFBT) and Joint Health Science Benefits Trust (JHSBT).

1. Updates to LTD Claim Forms

HBT has now finished updating all LTD claim forms for Healthcare, Community Social Services and Public Sector LTD Plans.

The effective date of the new forms is June 1, 2021. If you are in the middle of preparing a new claim submission based on the old forms and processes, there is no need to make any changes to that claim.

The principal changes include:

- Canada Life have been encountering challenges in adjudicating LTD claims in a timely manner because many claims contain incomplete employer or employee information. For the Employer Statement under Earnings and Benefit Information, **Canada Life now require the employee's compensation rate table or pay statement to be included. Canada Life will not initiate the LTD claims process until this information has been submitted;**
- Canada Life now accept electronic signatures. HBT have incorporated DocuSign, a digital signature technology, should this be the preferred method for signing. For the forms that have this technology incorporated, you will see (DocuSign version) next to the form on the HBT website. A DocuSign User Guide is attached with this eflash and is made available on our website on the two pages where DocuSign versions appear: *Rehab Referral/How to Make a Referral* and *News & Resources/Forms, Guides & Manuals*. Please see snippets below:

Forms, Guides and Manuals

This page provides downloadable manuals, forms and guides in PDF format.

[DocuSign User Guide](#)

How to Make a Referral

 Please note you must have Adobe Reader installed in order to access the PDF forms. You can fill these forms electronically and save, print or attach to email.

[DocuSign User Guide](#)

- Update on the description of HBT from "health and welfare trust" to "employee life and health trust";
- Merging of the Healthcare Excluded LTD claim forms with CSSEA Excluded LTD claim forms. LTD claim forms for Excluded Employees can now be found under "Excluded (Healthcare & CSSEA) LTD Claim Package";
- Addition of LTD claim package for "Non-Provincial Unions" (i.e. single site and non-standard LTD plans);
- Addition of LTD claim package for "Public Sector (Exempt & Union) LTD Claim Package";
- Canada Life's new name, email addresses, logo and address for the Vancouver office;
- Removal of requirement for gender-related information; and
- Removal of requirement for reporting employer-paid MSP contributions (as a result of MSP changes effective January 1, 2020).

What you need to do:

- Discard old printed versions of the claim forms; and
- Use the new claim forms located at:
<https://www.hbt.ca/News-and-Resources/Pages/AllFormsGuidesManuals.aspx>
 - Contact your HBT Benefits Team if you have any questions about which LTD claim package(s) apply to your employee groups.

Just a reminder that you should always access the forms from HBT's website. This will ensure that you are using the most up-to-date version of the forms.

2. Group Life, Accidental Death & Dismemberment, and Dependent Life Claim Forms

In the coming months, these forms on the HBT website will also be updated. The current forms are still applicable to the HBT and Joint Trusts benefit plans.

Please forward this communication to all departments within your organization that may require and rely on this information.

Questions

If you have any questions, please contact the HBT Benefits Team:

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Healthcare Benefit Trust eSignature DocuSign User Guide

May 2022

DocuSign landing page

Clicking the [DocuSign version](#) URL link of the forms located in the Healthcare Benefit Trust website will direct you to the landing page below.

The screenshot shows a web form titled "PowerForm Signer Information". It contains the following elements:

- A text input field with the placeholder text "(Name of the form)".
- A paragraph of text: "Please enter your name and email to begin the signing process."
- A dropdown menu labeled "Signee -" with the placeholder text "(Employee, Employer or Physician)".
- A label "Your Name: *" followed by a text input field with the placeholder text "Full Name".
- A label "Your Email: *" followed by a text input field with the placeholder text "Email Address".
- A blue button at the bottom labeled "BEGIN SIGNING".

To begin the signing process, enter the following:

1. Enter your **Full Name**
2. Enter your **Email Address** (Ensure email address is entered correctly. This is utilized by DocuSign to send email notification for incomplete documents.)

Document Signing Process

1. **Important:** Please read the [Electronic Record and Signature Disclosure](#).

You will find the link to the Disclosure in the Signing page like the image below.

Please Review & Act on These Documents

 **Healthcare Benefit Trust**
Healthcare Benefit Trust

 Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

Employee

2. After reading the Electronic Record and Signature Disclosure, put a check in **Agree on Electronic Record and Signature Disclosure**, then click **Continue**.

 Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

Note: This form is also to be used for full-time community health workers) u

Attach a copy of the back-up documen

Employee

3. **Fill out** and enter all necessary fields required in the form.

4. Click the **Sign** icon. **Note:** Use either of the 2 options below for your Signature.
- a. Option 1 select **DRAW** – create a freehand drawing of your signature by using your cursor or stylus pen. Click **ADOPT AND SIGN** once finished.

Adopt Your Signature [X]

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW** UPLOAD

DRAW YOUR SIGNATURE [Clear](#)

 [Red arrow points to signature]

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

- b. Option 2 select **UPLOAD** – upload your own signature image file by clicking **UPLOAD YOUR SIGNATURE** button and locating the image file on your device. Click **ADOPT AND SIGN** once completed.

Adopt Your Signature [X]

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE DRAW **UPLOAD**

PREVIEW

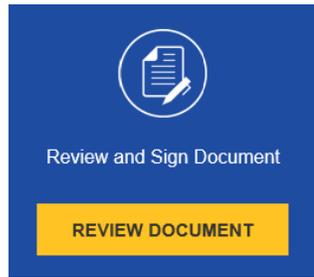
UPLOAD YOUR SIGNATURE [Red arrow points to button]

For best results use an image that is 400 x 145 pixels

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

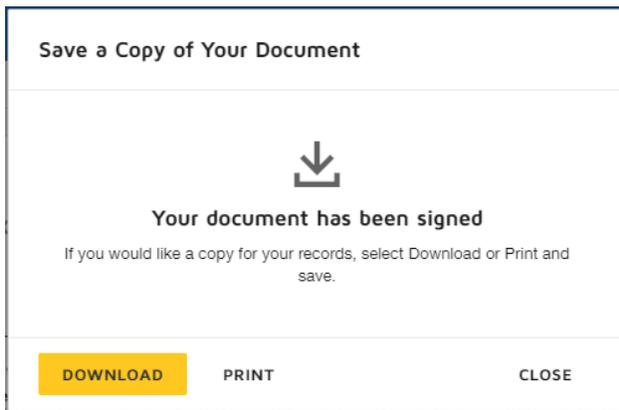
ADOPT AND SIGN CANCEL

5. Clicking **FINISH LATER** button at the top of the page allows you to save the document at its current state with all data entered and mark it pending for completion. This step will trigger an email notification to the email provided in the DocuSign landing page.

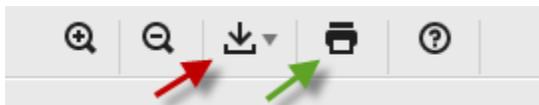


Click **REVIEW DOCUMENT** link in the email to continue signing the incompletd form. Click **FINISH** to complete the Signing process.

6. Click **DOWNLOAD** to save a copy of the completed signed form for your records on your device. Click **PRINT** if you would like to see the preview of the document. **Reminder:** Email completed forms to the respective offices.



7. Click **LEAVE** if promoted to proceed to the preview page. Note the additional options available in the preview page.



- Click Icon pointed by RED ARROW to download a copy of the completed signed form.
- Click Icon pointed by GREEN ARROW to print the document.

Important Notes:

- Email completed forms to the respective offices.
- Clear Data** button located at the bottom of the forms are not functional.