



Disability Insurer Examination Preparation

The next time you need to refer for a Disability IE, use this checklist to ensure you have gathered all of the required documentation and have referred for the most appropriate assessors/assessments.

Documentation

Disability Certificates (OCF 3) - the original and any subsequent	√
Employer confirmation Form (OCF 2) & Job Site Assessment (re: Income Replacement Benefit eligibility)	√
Ambulance & Hospital Records (if any)	√
Relevant medical documentation regarding disability including any previous Insurer Examination reports	√
Pre-accident clinical notes & records from family physician & any other treating professionals, including physiotherapist, chiropractor, psychologist, etc.	√
In-home Assessment report (re: Caregiver & Non-earner benefit eligibility)	√

Assessors/Assessments

Physicians specific to the disability, For example: <ul style="list-style-type: none"> • Orthopaedic Physician for fractures • Psychologist for emotional issues • Neuro-psychologist for brain injury 	√
Functional Abilities Evaluation – to assess functional status and compare with a Job Site Assessment (re: Income Replacement Benefits eligibility)	√
In-home Assessment – to assess ability to perform activities of daily living (especially important re: Caregiver and Non-earner eligibility)	√

