

Physician Information Checklist

Ontario LTD - Change of Definition / Any-Occupation Review

Share with treating physicians before a confirmed transition date.

This checklist is informational and does not create a solicitor-client relationship.

1. Diagnosis and clinical course

- Current diagnoses and how symptoms have changed over the claim period
- Specialists involved and frequency of follow-up
- Medications, side effects, and impact on work capacity

2. Functional restrictions (not diagnosis alone)

- Physical limits: sitting, standing, lifting, walking, stamina
- Cognitive limits: focus, memory, pace, decision-making
- Psychological limits: stress tolerance, emotional regulation, triggers
- How long each activity can be sustained, and recovery needed afterward

3. Occupational relevance

- Why restrictions prevent the claimant's own occupation, if still relevant
- Why the same restrictions would also prevent other occupations proposed
- Failed return-to-work or rehabilitation attempts and why unsustainable

4. Prognosis and consistency

- Expected course over the next months, if known
- Barriers to further treatment or assessment
- Consistency with prior clinical notes and objective findings where available

Ontario Long-Term Disability Lawyers - ungated download (no email required)