

Group Income Protection

Early Intervention Consent Form

Important Notes:

Your employer has contacted Generali to suggest that you may benefit from the provision of specialist support appropriate to your wellbeing needs (our Early Intervention Service) to help you remain at work or support a return to work. In order to provide this support, we may need to process categories of personal data which have additional protection under data protection law. Once you have completed and signed this form, please return page 1 to

your employer, and retain pages 2 & 3 for your records. Any offer of rehabilitation support, at any stage of -or prior to- absence from work, does not indicate eligibility for, or validity of payment of a claim for Income Protection benefit (i.e. payment of a proportion of salary in the event of long term incapacity) under a Group Income Protection policy. Please note our signature requirements which can be found on page 3.

Name:

Date of Birth:

Employer's name:

Home Address:

Personal email:

Daytime telephone:

How we use your personal data

In order to provide Early Intervention Services, we may need to process categories of personal data which have additional protection under data protection law.

Please select **either** option A **or** option B below:

(A) I expressly consent to Generali processing categories of personal data about me which have additional protection under data protection law.

I may withdraw my consent at any time. However, if my consent is withdrawn, this will impact Generali's ability to provide Early Intervention Services.

My personal data will be used in accordance with Generali's privacy policy, available at www.generali.co.uk/Info/Privacy-Information or by contacting our Data Protection Officer by emailing privacy@generali.co.uk or writing to The Data Protection Officer, Assicurazioni Generali S.p.A. UK Branch, 55 Mark Lane, London EC3R 7NE

I consent to my personal data being supplied to Generali. I understand that any personal data supplied may be used by Generali in connection with the insurance arrangements that have been put in place by my employer for income protection benefit. In particular any personal data supplied may be used for some or all of the following purposes: Early Intervention Services & rehabilitation. Any personal data supplied may be shared with my employer, my employer's advisers, Generali's advisers, insurance intermediaries and other service providers for the purposes of rehabilitation.

(B) I do not* consent to my personal data being supplied to Generali.
**Without your consent, we may not be able to provide our Early Intervention Service.*

I agree that a copy of this consent shall have the validity of the original.

Signature:

Date:

Please note our signature requirements which can be found on page 3

Who are Generali?

Generali is one of the largest global insurance providers. One of the insurance products that we offer, is Group Income Protection. Your employer has a Group Income Protection policy with Generali.

What is Group Income Protection?

Group Income Protection (GIP) is a product purchased by some employers. If an employee is unwell and unable to work for an extended time, a GIP policy can provide replacement income, subject to a satisfactory medical assessment. Your employer can tell you more about this part of the policy and your eligibility.

In addition to providing replacement income, your employer's GIP policy with Generali also gives you access to support services, to help you to remain at work or return to work during illness or personal difficulty.

Why has my employer referred me for support services?

You might be referred to Generali for support if:

- You are at work but struggling with a personal situation or medical condition
- You are absent from work due to a personal situation or medical condition
- You are due to take some time off work for medical treatment

The purpose of a referral to Generali is always to provide support for you. It might not be the right time for you to return to work yet if you are absent, but we may be able to provide some help for you during your recovery.

What support will I receive?

Generali can provide access to a range of services, and this could include:

- Vocational Rehabilitation Support – help with return to work planning, and advice for you and your employer of any adjustments you might need.
- Talking Therapies
- Physiotherapy
- Pain / Fatigue Management Programmes

These are some examples of the types of support we can offer. The support you receive will be decided following a conversation with you about your circumstances, so that we can understand whether our services are suitable for you.

What if I have access needs?

If you have any access requirements, or any concerns that symptoms of your medical condition might make it difficult for you to accept our support services, please do advise your employer of this. We will be very willing to make adjustments where possible, and work flexibly around your requirements.

What happens next?

Your employer has given you this Generali consent form to complete. This allows us to share your information with our clinical providers (the partners we work with to deliver this support).

When you complete this, it should be sent to your employer, who will share it with us. Before submitting the form, please note the section on page 4 regarding signature requirements.

Where appropriate, we will make a referral to one of our clinical providers, and after this you will receive a telephone call directly from them to offer you an appointment. We will let your employer know the name of the provider who is going to contact you. Your employer can then let you know who to expect a call from.

You will usually be asked to complete a consent form by the clinical provider. Because the information you share could be sensitive, every provider you speak with (including Generali) needs to do their own checks to make sure they have the right consent in place with you.

What happens in the Initial Appointment?

Your first appointment will be a conversation, lasting usually around 60 minutes (or longer as needed). This is to understand the support you need. After your appointment, the clinical provider will usually send a report to Generali which tells us what support you would benefit from.

Our information will only be shared in line with the consent you provide. We do ask that you consider allowing information to be shared openly with your employer. It could limit our ability to help you return to work if we cannot let your employer know what help you need.

How does this affect my existing support?

Any treatment or support you are already receiving should usually continue. It is helpful if you could let your employer know when you return your consent form if you are already receiving treatment (such as talking therapies, or physiotherapy), so that we can make sure you do not have a cross over of support.

If your employer has also asked you to see Occupational Health, then this can also continue. The support that Generali offers is different to Occupational Health, and with your permission we can also work alongside any recommendations Occupational Health have given.

Who do I contact if I have any questions?

You should contact your employer in the first instance, who will let us know if your question cannot be answered by your HR Team.

Signature Requirements

We can accept the following as a signature:

1. Wet signature
2. Digitally drawn wet signature (e.g. using a tablet / stylus)
3. If neither of the above is possible, an email - preferably from your corporate email address - which attaches page 1 of this consent form completed digitally, showing the options selected, and including the following statement: "I consent to Generali processing/sharing my personal data for the purposes of claims management, compliance, complaint handling, general administration, the prevention and detection of fraud/attempted fraud, occupational health, rehabilitation and underwriting, as set out in the attached consent form."

Please note that we **cannot** accept a typed signature or docusign at this time.

Once you have completed and signed this form, please return page 1 to your employer, and retain pages 2 & 3 for your records.

If sending by post, please use Special Delivery.

Assicurazioni Generali S.p.A. UK Branch, 55 Mark Lane, London EC3R 7NE

Company incorporated in Trieste in 1831. Share capital €1,602,462,715.77 fully paid-up. Registered office at Piazza Duca degli Abruzzi 2, Trieste, Italy. Italian tax identification and companies registry number 00079760328. Authorised and regulated by Istituto per la Vigilanza sulle Assicurazioni (IVASS). Authorised by the Prudential Regulation Authority. Subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. Details about the extent of our regulation by the Prudential Regulation Authority are available from us on request. Registered in the IVASS register of insurance and reinsurance companies under no. 1.00003. Parent company of Generali Group and entered in the IVASS register of insurance groups under no. 026. UK company registration no. BR1185