



Transamerica Financial Life Insurance Company Home Office: Harrison, New York Transamerica Life Insurance Company Transamerica Premier Life Insurance Company

Fax Number: 866-586-6528

Instructions for Submitting a Claim

This Health Claim Package consists of multiple parts. When filling out each section of the package, please keep in mind that you should provide complete and accurate information. If you make a claim on your dependent who is over the age of 18, the claimant (patient) needs to sign and date the HIPAA Authorization for the Release of Health-Related Information ("HIPAA Authorization") – you cannot sign for the dependent. Take a moment, also, to verify that the doctor completing the Attending Physician's Statement answers all questions and signs and dates the form.

Here are some other common documents and statements needed when filing certain types of health claims. It's important to note that the list of forms and information within each claim type are generic. You should refer to your actual policy benefits to help determine what else you may need to submit to us for consideration.

Accident/Disability*

Claimant's Statement, Attending Physician's Statement (unless applying for accident medical expense benefits), HIPAA Authorization, Employer's/Business Entity's Statement, statement(s) showing actual charges/expenses for medical treatment or diagnosis, and a police report if the disability is a result of a motor vehicle accident. If the disability began with an emergency room visit, please provide us with a copy of the discharge summary; if the disability was an on-the-job accident, provide us with a first report of the injury.

Critical Assistance*

Claimant's Statement, Attending Physician's Statement, HIPAA Authorization, diagnostic reports (a pathology report if cancer-related), discharge summary or other medical records indicating the condition and date of diagnosis.

Cancer*

Claimant's Statement, Attending Physician's Statement, HIPAA Authorization, along with a pathology report diagnosing cancer. Itemized provider statements with actual charges/expenses (**) incurred for the treatment.

Heart/Stroke**

Claimant's Statement, Attending Physician Statement, HIPAA Authorization, and all itemized hospital statements with actual charges/expenses incurred for the treatment.

Intensive Care/Hospital Indemnity

Claimant's Statement, Attending Physician's Statement, HIPAA Authorization, itemized hospital or UB04 statements, and ambulance statement if transported (ICU Coverage only).

*For Wellness Screening Benefit, you only need to submit statements or medical records from the physician or hospital showing the date and procedure performed. No additional documents are necessary.

**If you are covered by Medicare or Medicaid or other insurance, please submit statements from doctor/medical provider/hospital showing payments or adjustments by Medicare, Medicaid, or your other insurance. You also must send any other information showing the actual charges or expenses incurred for your treatment, which includes copies of all summary notices from Medicare or Medicaid, or explanations of benefits from your other insurance.



Supplemental Health Insurance Claim Form

Transamerica Financial Life Insurance Company Home Office: Harrison, New York Transamerica Life Insurance Company Transamerica Premier Life Insurance Company

2700 W Plano Parkway, Plano TX 75075

Fax Number: 866-586-6528						
E-mail: TEBclaimsscanning@transamerica. By furnishing this form, the Company d		are is any insurance in force and d	nes not v	vaive any of its rights or defenses		
by farmishing this form, the company a			00311011	valve any or its rights of defendes.		
	CLAIMAN	NT'S STATEMENT				
1. Insured's Full Name	2. Date of Birth	Policy or Certificate Nur	nber	Social Security Number		
5a. Mailing Address			6. Phone Number			
5b. Street Address		7. Emai	il Address			
8. Employer). Occupation		10. Work Phone Number			
11. Patient's Full Name	2. Date of Birth		13. Relationship to Insured			
	L					
		ON THAT APPLIES TO YOUR L		h to this form		
If additional space is needed for any question, please use an additional sheet of paper and attach to this form. 1. Nature of injury or illness 2. Have you previously had this same or similar condition? Yes No						
3. When did symptoms first appear or accident occur? If an injury, explain fully how and where accident occurred. 4. Date first treated/diagnosed						
5. Name and address of physician (list all physicians of	consulted)					
6. Do you have Medicare?						
7. Have you been confined to a hospital for this condi □Yes □No Admission date: Discharge Da	Please give name and addre	Please give name and address of hospital.				
9. Were you confined in an Intensive Care Unit during ☐ Yes ☐ No	10. If you had surgery, please	10. If you had surgery, please give the name and address of the surgeon				
If yes, for how many days?						
If you were unable to work due to this condition, pl From To	12. If you were restricted to light From	12. If you were restricted to light duty due to this condition, please give dates. From To				
13. When do you expect to resume your usual duties?			14. Are you filing a Workers' Compensation claim?			
heart trou			Have you ever been treated for or diagnosed as having had a heart attack, heart trouble or any abnormal condition of the heart; cancer; or diabetes prior to the effective date of this policy? ☐ Yes ☐ No			
If yes, provide condition and date?						
17. Please give the name and address of the physicia	n and/or hospital who tre	eated you for this the condition in box	16.			

Please continue onto next page

If you are filing for disability bene Entity Statement completed by yo		cident or sickness, please	e complete this sectio	n and have the attached	d Employer's Business		
To the best of your knowledge, in Salary Continuance/Sick Leave [EIB/PTO							
Short Term Disability Worker's Compensation State Disability Social Security Dependent Social Security No Fault (Income Replacement) Retirement/Pension Permanent Total Disability Other (Please Identify	Applied For	Receiving	Amount \$ \$ \$ \$ \$ \$ \$	Frequency	From/To Dates!!!!!!!!!		
All must sign and date below. All of the above answers and statements are true and complete, and correctly recorded. I have read and understand the appropriate Fraud Warning. I understand that the furnishing of forms by the Company does not constitute an admission that there is any insurance coverage in force or payable.							
For residents of New York: any perinsurance or statement of claim commaterial thereto, commits a fraudu the stated value of the claim for ear other than the certifications require	ntaining any materially lent insurance act, whic ch such violation. The I	false information, or cond h is a crime, and shall also nternal Revenue Service	eals for the purpose of be subject to a civil per	misleading, information alty not to exceed five t	concerning any fact housand dollars and		
Claimant Signature							
Print Name							
Date (mm/dd/yyyy)							

Fax Number: 866-586-6528

ATTENDING PHYSICIAN'S STATEMENT								
1. Insured's Full Name				2. Policy or Certificate Number				
3. Patient's Full Name					4. Patient's Date of Birth			
5. For this pat	ient: Are you being paid ☐ Yeby Medicare? ☐ No		paid 🗆 Yo		g paid by	Yes If yes, what comp No	any?	
6. Diagnosis?	Diagnosis? (Please use ICD 10 Codes) 7. When did symptoms first appear or accident happen?			ppear or	8. When did the for this condi	patient first consult yetion?	9. Is this condition work related?	
10. If the patie	ent previously received medical tre	atment, please provi	de the physi	cian's/hospital's nan	ne and address.		I	
11. If the claim is for pregnancy, please give due date and type of delivery.			12. Has the patient ever had the same or similar condition? ☐ Yes ☐ No (If yes, state when and describe)					
13. Describe any other disease or infirmity affecting present condition.			14. List surgical procedure(s), if any, and include the date of the procedure(s). (Please use current CPT codes.)					
15. List the dates of treatment and the charges for each visit.			If the patient was hospitalized, please give the name and address of the hospital and dates of confinement.					
17. Is the patient still under your care for this condition? ☐ Yes ☐ No			18. If the patient has been referred to another physician, please give the name and address.					
If discharged, please give date								
19. Did you advise patient to cease work? ☐ Yes ☐ NoIf yes: From To			Please give dates of total disability for this condition. From To					
21. If the patient was released to light duty due to this condition, please give dates.			22. Was the patient unable to perform two or more ADL's (Activities of Daily Living) due to this condition? ☐ Yes ☐ No					
From To If so, which ones? 23. Has patient ever been treated for a heart attack, heart trouble or any abnormal condition of the heart; cancer; or diabetes prior to this time? □ Yes □ No If yes, please advise when and name and address of doctor/hospital treating patient.								
24. Please list conditions and corresponding dates for which you previously treated this patient within the past five years.								
Date	Physician's Name – Print		Signature			Degree	Phone Number ()	
Street address City					State	Zip	Tax Identification Number	



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Claims Fax: 866-586-6528

Claims Email: TEBclaimsscanning@transamerica.com Claims Customer Service: 800-251-7254

If you are filing for disability benefits as a result of an accident or sickness, have the below completed by your employer.						
Employer's/Business Entity's Statement (Does not apply to Cancer, Hospital and Critical Illness coverages)						
1. Company Name:			2. Phone Number:			
3. Street Address:	4. C	Dity:		5. State:	6. Zip Code:	
7. Name of Employee/Insured Person: 8. Social Security Number:						
9. IMPORTANT: date Employee/insured person was last a	active	ely at work:				
10. Employee's/Insured Person's job title/major job duties	(Ple	ease attach a copy of job desc	crip	otion):		
11a. Did disability occur on the job? ☐ Yes ☐ No	1	1b. Job Classification: ☐ Sed ☐ Hea		ary □ Light □ Very He		
12. Date employee/insured person returned to work: ☐ Full Time ☐ Part Time ☐ Light Duty		13. If "Part Time", due to Amount:	-	=	provide earnings: Dates:	
14. Employee/Insured Person's status of employment after first day absent: □ Active □ Leave of Absence □ Laid Off □ Retired □ Terminated Other: 15. Employee/Insured Person's <u>current</u> status of employment: □ Active □ Leave of Absence □ Laid Off □ Retired □ Terminated Effective:						
16. Annual Salary \$ 17. If employee was medically cleared to return to work with restrictions or on light duty can you accommodate? ☐ Yes ☐ No If no, please attach a letter stating why accommodation is not possible.						
18.To the best of your knowledge, indicate if employee/insured person has filed for or is receiving income from any of the following sources: Salary Continuance/Sick Leave Yes No If "Yes," indicate number of hours as of last date worked EIB/PTO Yes No If "Yes," indicate number of hours as of last date worked Workers Compensation Yes No						
	<u>, </u>					
The above statements are true and complete to the best of my knowledge and belief.						
Employer's/Business Entity's Authorized Representative						
Name (please print)					e #	
Signature	_	Date	-			

Claim Fraud Warning

State Specific Notices:

Alabama: Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or who knowingly presents false information in an application for insurance is guilty of a crime and may be subject to restitution, fines or confinement in prison, or any combination thereof.

Alaska: A person who knowingly and with intent to injure, defraud, or deceive an insurance company files a claim containing false, incomplete, or misleading information may be prosecuted under state law.

Arizona: For your protection, Arizona law requires the following statement to appear on this form. Any person who knowingly presents a false or fraudulent claim for payment of a loss is subject to criminal and civil penalties.

Arkansas, District of Columbia, Louisiana, Rhode Island, West Virginia: Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

California: For your protection, California law requires the following to appear on this form. Any person who knowingly presents false or fraudulent claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

Colorado: It is unlawful to knowingly provide false, incomplete, or misleading facts or information to any insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance and civil damages. Any insurance company or agents of an insurance company who knowingly provides false, incomplete, or misleading facts or information to a policyholder or claimant for the purpose of defrauding or attempting to defraud the policyholder or claimant with regard to a settlement or award payable from insurance proceeds shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

Delaware, Idaho, Indiana: Any person who knowingly, and with intent to injure, defraud or deceive any insurer, files a statement of claim containing any false, incomplete or misleading information is guilty of a felony.

Florida: Any person who knowingly and with intent to injure, defraud, or deceive any insurer files a statement of claim or an application containing any false, incomplete, or misleading information is guilty of a felony of the third degree.

Kentucky: 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.

Maine, Tennessee, Virginia, Washington: It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits.

Maryland: Any person who knowingly or willfully presents a false or fraudulent claim for payment of a loss or benefit or who knowingly or willfully presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

Minnesota: A person who files a claim with intent to defraud or helps commit a fraud against an insurer is guilty of a crime.

New Hampshire: Any person who, with a purpose to injure, defraud, or deceive any insurance company, files a statement of claim containing any false, incomplete, or misleading information is subject to prosecution and punishment for insurance fraud, as provided in N. H. Rev. Stat. Ann. § 638:20.

New Jersey: Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.

New Mexico: ANY PERSON WHO KNOWINGLY PRESENTS A FALSE OR FRAUDULENT CLAIM FOR PAYMENT OF A LOSS OR BENEFIT OR KNOWINGLY PRESENTS FALSE INFORMATION IN AN APPLICATION FOR INSURANCE IS GUILTY OF A CRIME AND MAY BE SUBJECT TO FINES AND CONFINEMENT IN PRISON.

New York: 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 shall also be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.

Ohio: Any person who, with intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement is guilty of insurance fraud.

Oklahoma: WARNING: Any person who knowingly, and with intent to injure, defraud or deceive any insurer, makes any claim for the proceeds of an insurance policy containing any false, incomplete or misleading information is guilty of a felony.

Oregon: Any person who knowingly and with intent to defraud an insurance company files an application for insurance or statement of claim containing any materially false information may be guilty of insurance fraud. To deny a claim on the basis of misstatements, misrepresentations, omissions or concealments, the misinformation must be material to the content of the policy, the insurer must rely upon the misinformation and the misinformation must be either material to the risk assumed by the insurer or provided fraudulently. For remedies other than denial of a claim, misstatements, misrepresentations, omissions or concealments must either be fraudulent or material to the interests of the insurer in order for the insurer to assert a right to remedy. Misstatements, misrepresentations, omissions or concealments are not fraudulent unless they are made with the intent to knowingly defraud.

Pennsylvania: Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance 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.

Puerto Rico: Any person who knowingly and with the intention of defrauding presents false information in an insurance application, or presents, helps, or causes the presentation of a fraudulent claim for the payment of a loss or any other benefit, or presents more than one claim for the same damage or loss, shall incur a felony and, upon conviction, shall be sanctioned for each violation by a fine of not less than five thousand dollars (\$5,000) and not more than ten thousand dollars (\$10,000), or a fixed term of imprisonment for three (3) years, or both penalties. Should aggravating circumstances [be] present, the penalty thus established may be increased to a maximum of five (5) years, if extenuating circumstances are present, it may be reduced to a minimum of two (2) years.

Texas: Any person who knowingly presents a false or fraudulent claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison

FOR RESIDENTS OF ALL OTHER STATES AND TERRITORIES: Any person who knowingly, and with intent to injure, defraud or deceive 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.





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2700 West Plano Parkway, Plano, TX 75075

This authorization complies with the HIPAA Privacy Rule. A copy of this authorization will be considered as valid as the original.

Note to claimant/personal representative: This authorization must be signed for us to receive medical records under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"). Although we may not need to obtain medical records to process your claim, we must obtain this form to avoid possible delays if medical information is needed.

I authorize all physicians, medical practitioners, hospitals, clinics, pharmacies, pharmacy benefit managers, long term care facilities (including assisted living facilities), home health care entities and other medical care institutions, medically related facilities, medical or hospital service and prepaid health plans, employers and group policy holders, contract holders and benefit plan administrators, state and federal governmental agencies (including law enforcement agencies), Social Security Administration, Internal Revenue Service and Veteran Administration facilities, coroners, medical examiners and any other person or entity that has any health information relating to the insured/ patient named below (collectively, the "Providers") to disclose the entire medical record and any other protected health information concerning the insured/patient to the company(ies) referenced at the top of this authorization (the "Companies"), their affiliates and reinsurers, and any business associate, agent, employee, representative, investigator, benefit plan administrator, consumer reporting agency (including MIB, Inc. formerly known as the Medical Information Bureau) or independent claim administrator acting on behalf of any of the Companies. This authorization includes release of any oral, written, or electronic information, records, documents, or knowledge concerning any medical care, medical advice, diagnosis, treatment or supplies, including psychiatric or mental health records (excluding psychotherapy notes), prescription drug information, substance abuse records, medical records, medical notes, and medical recordings. This also includes information on the diagnosis or treatment of Human Immunodeficiency Virus (HIV) infection and sexually transmitted diseases, to the extent permitted by state law.

By my signature below, I acknowledge that any agreements the insured/patient has made to restrict his or her protected health information do not apply to this authorization and I instruct the Providers to release and disclose the **entire medical record and any other protected health information as noted above** without restriction.

The information disclosed will be used for claims processing, including but not limited to evaluating contestability, eligibility determination, and/or benefit determinations.

This authorization shall remain in force for 24 months, or in the case of long term care or disability claims for the duration of the claims under such policy, following the date of my signature below. I understand that I have the right to revoke this authorization in writing, at any time, by sending a written request for revocation to the Companies at Attention: Consumer Affairs Department, 4333 Edgewood Road NE, Cedar Rapids, Iowa 52499. Alternatively, I may revoke this authorization by sending a written revocation directly to the Providers. I understand that a revocation is not effective to the extent that any of the Providers has relied on this Authorization or to the extent that the Companies have a legal right to contest a claim under an insurance policy or to contest the policy itself. I understand that any information disclosed pursuant to this authorization may be subject to redisclosure by the recipient and may no longer be protected by federal regulations governing privacy and confidentiality of health information (such as the HIPAA Privacy Rule). However, the Companies will protect the privacy of health information in accordance with other applicable state and/or federal privacy laws and their own privacy policies. I understand that I have a right to receive the Notice of Health Information Privacy Practices upon request.

of the insured/patient, I am legally permitted to do so as the personal representative of the insured/patient, and (2) I have received a copy of this authorization.

Name of insured/patient (please print)

Date of birth

Signature of Insured/Patient or Personal
Representative of the Insured/Patient

Description of Personal Representative's Authority or Relationship to Insured/Patient

Policy or Contract Number
(for use in Claims processing)

I understand that Providers that are subject to the HIPAA Privacy Rule (not including the Companies) may not refuse to provide treatment or payment for health care services because I refuse to sign this authorization. I do understand that if I refuse to sign this authorization to release the **entire medical record** of the insured/patient, the Companies may not be able to proceed with claims or eligibility processing or make any benefit payments. I acknowledge that (1) if I am signing on behalf





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Home Office: Harrison, New York
Transamerica Advisors Life Insurance Company
Transamerica Life Insurance Company
Transamerica Premier Life Insurance Company
2700 West Plano Parkway, Plano, TX 75075

Name of Insured	Social Se	Social Security Number		
Policy Number(s)		l l		
Please list below the names, add including doctors and hospitals, beginning throug If more space is needed, please a	consulted or used by the h	e insured for the fol	oroviders, lowing dates,	
Primary/ Family Physician		Phone Numb	per	
Street Address	City	State	Zip Code	
Reason for Visit	<u>'</u>	Dates Co	onsulted or Year Treated	
Provider Name		Phone Numb	per	
Street Address	City	State	Zip Code	
Reason for Visit		Dates Co	onsulted or Year Treated	
Provider Name		Phone Numb	per	
Street Address	City	State	Zip Code	
Reason for Visit		Dates Co	onsulted or Year Treated	

Name of Insured	Poli	cy Number(s)			
Provider Name				Phone Nun	nber
Street Address		City		State	Zip Code
Reason for Visit				Dates (Consulted or Year Treated
For the dates listed on page 1 (see label on Rx bottle). If mo Medication Name	, the following presore space is needed	ed, please	attach ad	lditional pa	e insured ages to this form. Physician Name
Name/ Address of Pharmacy	'		1		
Medication Name	Condition Being	Treated		Prescribing F	Physician Name
Name/ Address of Pharmacy	l l				
Medication Name	Condition Being	Treated		Prescribing F	Physician Name
Name/ Address of Pharmacy					
Medication Name	Condition Being	Treated		Prescribing F	Physician Name
Name/ Address of Pharmacy					
For residents of New York: any poperson files an application for it conceals for the purpose of mislinsurance act, which is a crime, at the stated value of the claim for e	nsurance or stateme leading, information o and shall also be subje	nt of claim concerning a	containing ny fact ma	any materia terial theret	illy false information, or o, commits a fraudulent
Claimant's Signature			Date (m	nm/dd/yyyy)	
Claimant's Printed Name					

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