



Transamerica Life Insurance Company  
Transamerica Premier Life Insurance Company  
P.O. Box 869097 Plano, TX 75086-9097  
Claims fax: 866-224-6547  
Claims email: TEBclaimsscanning@transamerica.com  
Claims customer service: 800-251-7254

## HEALTH MULTIPURPOSE CLAIM PACKAGE B Instructions for Submitting a Claim

**Claims Customer Service: 800-251-7254 (7:00 a.m. – 6:00 p.m. Monday-Thursday, and 7:00 a.m. – 5:00 p.m. Friday)**

This package has four parts: Claimant's Statement, Attending Physician's Statement, Required Fraud Warning Statements and Authorization for the Release of Health Information. We understand your need for a timely evaluation of your claim. When completing each part, keep in mind you can prevent the potential of a delay by providing complete and accurate information. Please complete all answers on the **Claimant's Statement** that are applicable to your claim. If the claim is on your dependent over the age of 18, the Claimant (patient) needs to sign and date the Authorization for the Release of Health Information. When you ask the doctor to complete the **Attending Physician's Statement**, verify that the questions are answered and that it is signed and dated.

Below are some of the more common documents and statements that are needed when filing a claim for a given type of policy. The suggested documents are not comprehensive. Refer to your policy benefits to help determine what information should be submitted for consideration.

### **Cancer & Specified Disease\*:**

The four parts of the Claim Package plus the pathology report diagnosing cancer, itemized hospital bills, surgery/anesthesia bills, attending physician bills, chemotherapy and radiation bills.

### **Intensive Care\*\*:**

The four parts of the Claim Package plus the itemized hospital or UB92 statement and, if an ambulance was used, a statement showing the actual charges/expenses incurred.

### **Accident/Disability\*:**

The four parts of the Claim Package plus, if emergency medical treatment was received, a statement showing actual charges/expenses incurred with the diagnosis and a police report (if one was prepared). If filing for accident medical-expense benefits, Attending Physician's Statement is not required.

### **Critical Assistance\*:**

The four parts of the Claim Package plus diagnostic reports (pathology report for a cancer diagnosis) or medical records indicating the condition and the date it was diagnosed.

### **First Occurrence Cancer:**

The four parts of the Claim Package plus a pathology report diagnosing cancer.

### **Heart & Stroke, Hospital Indemnity:**

The four parts of the Claim Package plus itemized hospital statements, itemized surgery statements, itemized anesthesia statements and (for Heart & Stroke) itemized physician statements. These itemized statements should show the actual charges/expenses incurred for your treatment.

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



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# Health Multipurpose Claim Package B

By furnishing this form, the Company does not admit that there is any insurance in force and does not waive any of its rights or defenses.

### CLAIMANT'S STATEMENT

1. Insured's Full Name	2. Date of Birth	3. Policy or Certificate Number	4. Social Security Number
5a. Mailing Address			6. Phone Number
5b. Street Address			7. Email Address
8. Employer	9. Occupation		10. Work Phone Number
11. Patient's Full Name	12. Date of Birth		13. Relationship to Insured

**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. When have you had this same or similar condition?
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 consulted)	
6. What other health insurance do you have? (list all companies)	
7. Have you been confined to a hospital for this condition? <input type="checkbox"/> Yes <input type="checkbox"/> No Admission date: _____ Discharge Date: _____	8. Please give name and address of hospital.
9. Were you confined in an Intensive Care Unit during this hospital stay? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, for how many days?	10. If you had surgery, please give the name and address of the surgeon
11. If you were unable to work due to this condition, please give dates. From _____ To _____	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? <input type="checkbox"/> Yes <input type="checkbox"/> No
15. If applying for waiver of premium, give dates of total disability. From _____ To _____	16. 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? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, when?
17. Please give the name and address of the physician and/or hospital who treated you for the condition in box 16.	

I hereby certify that all information submitted in connection with this claim is true and correct to the best of my knowledge and belief, and I agree that all information and materials subsequently submitted by me or on my behalf for this or any subsequent claim will be true and correct.

Claimant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_



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**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. Other Insurance, including Medicaid				
6. Diagnosis? (Please use ICD 10 Codes)	7. When did symptoms first appear or accident happen?	8. When did the patient first consult you for this condition?	9. Is this condition work related? <input type="checkbox"/> Yes <input type="checkbox"/> No	
10. If the patient previously received medical treatment, please provide the physician's/hospital's name and address.				
11. If the claim is for pregnancy, please give due date.		12. Has the patient ever had the same or similar condition? <input type="checkbox"/> Yes <input type="checkbox"/> 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) and the charges. (Please use current CPT codes.)		
15. List the dates of treatment and the charges for each visit.		16. If the patient was hospitalized, please give the name and address of the hospital and dates of confinement.		
17. Give number of days of ICU confinement.		18. Was Private Duty Nursing required and authorized by you? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, give dates.		
19. Is the patient still under your care for this condition? <input type="checkbox"/> Yes <input type="checkbox"/> No  If discharged, please give date _____		20. If the patient has been referred to another physician, please give the name and address.		
21. Please give dates of total disability for this condition. From _____ To _____		22. If the patient was released to light duty due to this condition, please give dates. From _____ To _____		
23. Was the patient unable to perform two or more ADL's (Activities of Daily Living) due to this condition? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, which ones?				
24. 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? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please advise when and name and address of doctor/hospital treating patient.				
25. 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

## REQUIRED FRAUD WARNING STATEMENTS

Claimants are required to acknowledge receipt of fraud warnings. Please refer to the fraud warning statement for your state as indicated below. Sign, date, and return with claim documents.

<p>FOR RESIDENTS OF <b>ALASKA</b>: 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.</p>	<p>FOR RESIDENTS OF <b>NEW HAMPSHIRE</b>: 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 by RSA 638:20.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>ARIZONA</b>: 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.</p>	<p>FOR RESIDENTS OF <b>NEW YORK</b>: 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 be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>CALIFORNIA</b>: For your protection California law requires the following to appear on this form. 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.</p>	<p>FOR RESIDENTS OF <b>NEW JERSEY</b>: Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>COLORADO</b>: It is unlawful to knowingly provide false, incomplete or misleading facts or information to an 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 agent 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 the insurance proceeds shall be reported to the Colorado Division of Insurance within the department of regulatory agencies.</p>	<p>FOR RESIDENTS OF <b>OHIO</b>: 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.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>DELAWARE, IDAHO, INDIANA</b> or <b>OKLAHOMA</b>: 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.</p>	<p>FOR RESIDENTS OF <b>OREGON</b>: 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 mis-information must be material to the content of the policy, the insurer relied upon the mis-information and the information was either material to the risk assumed by the insurer or provided fraudulently. Misstatements, misrepresentations, omissions or concealments are not fraudulent unless they are made with the intent to knowingly defraud.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>DISTRICT OF COLUMBIA</b> or <b>LOUISIANA</b>: 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 fines and confinement in prison.</p>	<p>FOR RESIDENTS OF <b>PENNSYLVANIA</b>: 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 subjects such a person to criminal and civil penalties.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>FLORIDA</b>: 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.</p>	<p>FOR RESIDENTS OF <b>PUERTO RICO</b>: 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 with the penalty of a fine of not less than \$5,000 and not more than \$10,000, or a fixed term of imprisonment for 3 years, or both penalties. Should aggravating circumstances are present, the penalty thus established may be increased to a maximum of 5 years, if extenuating circumstances are present, it may be reduced to a minimum of 2 years.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>MAINE, TENNESSEE</b> or <b>WASHINGTON</b>: 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.</p>	<p>FOR RESIDENTS OF <b>VIRGINIA</b>: Any person who, with the 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 may have violated the state law.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>MARYLAND, RHODE ISLAND, TEXAS</b> or <b>WEST VIRGINIA</b>: 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.</p>	<p>FOR RESIDENTS OF <b>ALL OTHER STATES AND TERRITORIES</b>: 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.</p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>FOR RESIDENTS OF <b>MINNESOTA</b>: A person who files a claim with intent to defraud or helps commit a fraud against an insurer is guilty of a crime.</p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>
<p>_____ Claimant's signature <span style="float: right;">Date</span></p>	<p>_____ Claimant's signature <span style="float: right;">Date</span></p>



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**AUTHORIZATION FOR THE RELEASE OF HEALTH INFORMATION**

I hereby authorize the use or disclosure of health information about the Insured as described below and revoke any previous restrictions concerning access to such information:

- Person(s) or group(s) of persons authorized to use and/or disclose the information:** Any physician, medical practitioner, hospital, clinic, pharmacy, long-term care facility, nursing home, assisted living facility, home health care entity, medical or medically-related facility, laboratory, and insurance company (including the Company selected above), or other organization, institution or person having records or knowledge of the Insured's health.
- Person(s) or group(s) of persons authorized to collect or otherwise receive and use the information:** the Company noted above, its affiliates, its reinsurers, their agents or other representatives, and business associates.
- Description of the information that may be used or disclosed:** This authorization relates to the release of any medical records necessary to evaluate and determine the Insured's eligibility for benefits, including, but not limited to, those containing diagnoses, treatments, prescription drug information, alcohol or drug abuse information, or information regarding AIDS. **Exception: psychotherapy notes require a separate signed authorization.**
- The information will be used or disclosed only for the following purpose(s):** The requested information will be used for any claim processing purposes, including but not limited to determining the Insured's benefit eligibility and making benefit determinations.

**STATEMENTS OF UNDERSTANDING & ACKNOWLEDGMENT:**

- I understand that the Insured's eligibility for benefits may be affected if I refuse to sign this form. In that case, the Company may not be able to determine if the Insured qualifies for benefits.
- I understand that the Insured has a right to receive the HIPAA Notice of Health Information Privacy Practices that explains the Company's privacy practices (not applicable to life, accident or disability insurance policies).
- I understand that if the organization authorized to receive the information is not a health plan or health care provider, the released information may no longer be protected by federal privacy regulations.
- I understand that I may revoke this authorization in writing at any time, except to the extent that action has already been taken in reliance on it, or to the extent that other law provides the Company with the right to contest a claim under the policy or the policy itself, by sending a written revocation to the Company's Privacy Official at the address at the top of this form. I also understand that the revocation of this authorization will not affect uses and disclosures of my health information for purposes of treatment, payment or health care operations.
- This authorization shall be valid for as long as claims continue under the policy, and I understand I am entitled to a signed copy.
- A copy of this authorization will be considered as valid as the original.
- I acknowledge that I have received a copy of this authorization

Patient/Insured's Name/Signature \_\_\_\_\_ Date \_\_\_\_\_

Patient/Insured's SSN \_\_\_\_\_ Patient/Insured's Date of Birth \_\_\_\_\_ Patient/Insured's Phone No. \_\_\_\_\_

Patient/Insured's Address \_\_\_\_\_

Personal Representative's (if any) Name/Signature: \_\_\_\_\_ Personal Representative's Phone No. \_\_\_\_\_

Personal Representative's (if any) Address \_\_\_\_\_

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

Policy or Contract Number \_\_\_\_\_

**Claimants should retain a copy of this signed document for their records**