Colonial Life Insurance
Supplemental (Bridge Plan) Insurance Claim Form
Received January 10, 2013

Attached are the requested forms that are required to process a claim request. This request can be faxed back into us at 1-800-880-9325 or mailed using the address included on the form.

If faxing the request, please allow 2-3 days for the claim request to be recorded into our system. Once your request is recorded, normal processing time is approximately two weeks for a claim request.

Please be sure to include the following information along with claim form:

- **The date(s) of treatment,**
- **Diagnosis (ICD9) codes,**
- **Copies of any related bills – doctor, ambulance, emergency room, hospital, and physical therapy.**

Also, our website has been enhanced! You can track the status of all claims at your convenience, and perform a host of other functions, by becoming a member of "my colonial life". To get started, visit us at www.coloniallife.com.

From:_____
No# of pages:_____
Or Mail to:
P.O. Box 100195
Columbia SC 29202

Medical Bridge Claim Form

Colonial Life
Making benefits count.

Please be sure to send the following Information:

- ✓ **Medical Documentation for your condition**
- ✓ **Diagnosis (ICD9) codes,**
- ✓ **Signed and dated authorization**

Fax to: Claims 1.800.880.9325
Phone Number: 1.800.325.4368

Fax this direction.

OPTIONAL SERVICE RELEASE AGREEMENT – Please **initial** below for optional services. Any other marks used (check mark, x, etc.) will not be considered as authorization and will be processed as blank.

I authorize Colonial Life to facilitate processing this claim by releasing its details to the individual inquiring on my behalf. Leave blank if you do not want anyone accessing your claim information.

_____sales representative _____ plan administrator

_____spouse, family member or significant other

_____I want Colonial Life to update me on the status of my claim through electronic messaging at my home phone number indicated on this form. Messages will be left with anyone that answers the phone or on my answering machine. To avoid blocked calls, I should program the number 1.800.325.4368 into my phone.

_____Yes, I want **ALL** payment(s) for this claim sent by overnight delivery. I understand payment(s) under $100.00 cannot be sent overnight and an $18.00 fee, which is subject to rate increases by carrier and **does not include weekend delivery,** will be deducted from my claim payment(s). **We are unable to overnight mail to a P.O. Box and you must notify us in writing to discontinue this service.**

****Please check the type of claim you are filing for below:**

☐ **Hospital Confinement** ☐ **Surgical Procedure** ☐ **Diagnostic Procedure** ☐ **Emergency Room** ☐ **Wellness**
☐ **Doctor's Office Visit** ☐ **Rehabilitation Benefit**

To be completed by Policy owner		
Claimant name __Male __Female	Birth Date	Claimant Social Security Number
Relationship to Policy Owner: ___ spouse ___ dependent ___self ____domestic partner		
Policy owner (First, Last)	Birth Date	Social Security Number
Mailing Address (Street or PO Box)		(Apartment/Unit/Lot number)
(City) (State) (Zip)		Home telephone number ( )
Policy owner e-mail address		Work telephone number( )

ACCIDENTAL INJURY- please **complete** and **attach itemized copies** of any related **bills**.	
Date the accident occurred (not when it was treated) _____ (MM/DD/YYYY)	Have you been treated for the same or similar condition prior to this occurrence? ___Yes ___No If yes, when? _____ (MM/DD/YYYY)
Check One: _____On-Job _____Off-Job	
Description of accident (if auto accident, attach a copy of the traffic report)	

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Claim Fraud Statements

For your protection, the laws of several states, including Alaska, Arkansas, Delaware, Idaho, Indiana, Louisiana, Minnesota, New Hampshire, Ohio, Oklahoma, and others require the following statement to appear on this claim form.

Fraud Warning : Any person who knowingly, and with intent to injure, defraud, or deceive an insurance company, files a statement of claim containing any false, incomplete, or misleading information is guilty of insurance fraud, which is a felony.

Arizona Residents : 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.

California, Rhode Island, Texas and West Virginia Residents : For your protection, California, Rhode Island, Texas and West Virginia 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 Residents : 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 insurance proceeds shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

District of Columbia and Maryland Residents : WARNING: It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits if false information materially related to a claim was provided by the applicant.

Florida Residents : 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 : For your protection, Kentucky law requires the following to appear on this form: Any person who knowingly and with intent to defraud any insurance company or other person files a 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 and Washington Residents : It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties may include imprisonment, fines or a denial of insurance benefits.

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

New York Residents : 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.

Pennsylvania Residents : 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 person to criminal and civil penalties.

Oregon Residents : Any person who, knowingly and 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 that is relied upon by the insurer and is material to the content of the policy and to the risk assumed by the insurer, may be prosecuted for insurance fraud. There is no time limit on contestability in the event of fraud on the part of the insured.

Puerto Rico Residents : 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 five thousand (5,000) dollars and not more than ten thousand (10,000) dollars, or a fixed term of imprisonment for three (3) years, or both penalties. If aggravating circumstances are 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.

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CERTIFICATION

Policy owner's Name_____ Social Security #_____

I have checked the answers on this claim form and they are correct. I certify under penalty of perjury that my correct social security number is shown on this form. I acknowledge that I received the Claim Fraud Statements on page 2 of this form and that I read the statement required by the State Department of Insurance for my state, if my state was listed on the form. **Fraud Warning: Any person who knowingly and with intent to defraud any insurance company or other person files a 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.**
Please remember to also sign and date the attached authorization required to process your claim.

X_____ X_____ X_____

Claimant's Signature Policy owner's Signature Date (MM/DD/YYYY)

Refer to your certificate for required proof of loss requirements. **Include a copy of your bill(s) showing the dates of service and the medical expenses incurred. Please send a copy of the anesthesiology bill if outpatient surgery was performed (some policies require). If bills are not attached you may have your physician complete this section and sign below.**

Hospital Name	Phone Number : ( )
Hospital Address: (Street) (City) (State) (Zip Code)	
Treating Doctor's Name :	Phone Number : ( )
Treating Doctor's Address: (Street) (City) (State) (Zip Code)	
Referring Doctor's Name:	Phone Number : ( )
Referring Doctors Address: (Street) (City) (State) (Zip Code)	
Admitting Diagnosis/ICD-9 Code :	Secondary Diagnosis/ICD-9 Codes :

Hospital Confinement Dates : From _____ (MM/DD/YYYY) To _____ (MM/DD/YYYY)

Intensive Care Unit Confinement Dates : From _____ (MM/DD/YYYY) To _____ (MM/DD/YYYY)

Rehabilitation Unit : From _____ (MM/DD/YYYY) To _____ (MM/DD/YYYY)

If hospital confinement is for pregnancy or pregnancy complications, please provide the date the pregnancy was diagnosed _____ (MM/DD/YYYY)

Date of delivery : _____ (MM/DD/YYYY) Type of delivery : ☐ Vaginal ☐ C-section Procedure Code for delivery_____

Surgical Procedure Date : _____ (MM/DD/YYYY) Procedure Description/Procedure Code :

Diagnostic Procedure Date : _____ (MM/DD/YYYY) Procedure Description/Procedure Code :

Date(s) of Doctor Office Visit(s): _____ (MM/DD/YYYY) _____ (MM/DD/YYYY) _____ (MM/DD/YYYY) _____ (MM/DD/YYYY)

FRAUD NOTICE: Any person who knowingly files a statement of claim containing false or misleading information is subject to criminal and civil penalties. This includes Attending Physician portions of the claim form.

Doctor's Signature (completing this form): Date :_____ (MM/DD/YYYY)

Tax ID or SSN : Phone Numbers: ( ) Fax Number: ( )

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***WELLNESS/HEALTH SCREENING**

If you wish to file a **Wellness/Cancer Screening claim for a test performed within the past 12 months**, you'll need to submit the type and date of the test performed as well as your doctor's name and phone number. We also need to know if this is for you or another covered individual and their name and social security number. If you file by telephone or internet please retain a copy of the medical information and/or your receipt if needed for further verification..

You may:

• **SUBMIT ON THE INTERNET** using the Wellness Claim Form at **coloniallife.com**, or

• **FILE BY PHONE!** Call **1.800.325.4368** and provide the information requested by our Automated Voice Response System, 24 hours per day, 7 days a week.

• Write your name, address, social security number and/or policy/certificate number on your bill and indicate "**Wellness Test**." **FAX** this to us at **1.800.880.9325** ***or*** **MAIL** to P.O. Box 100195, Columbia SC 29202

If your Wellness/Cancer Screening test was more than one year ago, you must fax or mail us a copy of the bill or statement from your doctor indicating the type of procedure performed, the charge incurred and the date of service. Please write your full name, social security number, and current address on the bill.

Type of Wellness Test Performed - Please complete one claim form for each claimant & for each calendar year.

- **You must attach a copy of the bill(s) for each test submitted.**
- **Please review your policy or policies for the list of covered tests prior to completing this form.**
- **The Health/Wellness Screening benefit is NOT payable for routine physical examinations.**
- **Most policies provide <u>one Health/Wellness benefit per calendar year</u>; (please refer to your policy for details.)**
- **<u>Please fill in the date for the test you had performed and attach a copy of the bill; the bill must include the Facility/doctor's name and telephone number</u>.**

Blood Glucose	____/____/____	**Electrocardiogram (EKG/ECG)**	____/____/____
Bone Marrow Testing	____/____/____	**Hemocult Stool Analysis**	____/____/____
Breast Ultrasound	____/____/____	**Mammogram (Breast)**	____/____/____
CA125 (Ovarian Cancer)	____/____/____	**Pap Smear/Thin Prep Pap (GYN)**	____/____/____
CA 15-3 (Breast Cancer)	____/____/____	**PSA (Prostate)**	____/____/____
Cancer Vaccine	____/____/____	**Serum Protein (Myeloma)**	____/____/____
Carotid Doppler	____/____/____	**Skin Biopsy**	____/____/____
CEA (Colon Cancer)	____/____/____	**Sigmoidoscopy**	____/____/____
Cholesterol (HDL/LDL/Lipids)	____/____/____	**Stress Test (Bicycle/Treadmill)**	____/____/____
Chest X-ray	____/____/____	**Thermography**	____/____/____
Colonoscopy	____/____/____	**Triglycerides**	____/____/____
Echocardiogram (Echo)	____/____/____		

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Authorization for Colonial Life & Accident Insurance Company

For the purpose of evaluating my eligibility for insurance and eligibility for benefits under an existing policy/certificate including checking for and resolving any issues that may arise regarding incomplete or incorrect information on my application or claim forms, I hereby authorize the disclosure of the following information about me and, if applicable, my dependents, from the sources listed below to Colonial Life & Accident Insurance Company (Colonial Life) and its duly authorized representatives.

Health information may be disclosed by any health care provider or institution, health plan or health care clearinghouse that has any records or knowledge about me including prescription drug database or pharmacy benefit manager, or ambulance or other medical transport service. Health information may also be disclosed by any insurance company, Medicare or Medicaid agencies or the Medical Information Bureau (MIB). Health information includes my entire medical record and insurance claim history but does not include psychotherapy notes. Non health information including earnings or employment history or any other facts deemed appropriate by Colonial Life to evaluate my application or claim forms may be disclosed by any entity, person or organization that has these records about me, including but not limited to my employer, employer representative and compensation sources, insurance company, financial institution or governmental entities including departments of public safety and motor vehicle departments.

Any information Colonial Life obtains pursuant to this authorization will be used for the purpose of evaluating and administering my claim for benefits. Some information obtained may not be protected by certain federal regulations governing the privacy of health information, but the information is protected by state privacy laws and other applicable laws. Colonial Life will not re-disclose the information unless permitted or required by those laws. Re-disclosed information may no longer be protected by federal privacy laws.

This authorization is valid for two (2) years from its execution or the duration of my claim, whichever is earlier and a copy is as valid as the original. I know that I or my authorized representative may request a copy of this authorization and access to this information. This authorization may be revoked by me or my authorized representative at any time except to the extent Colonial Life has relied on the authorization prior to notice of revocation or has a legal right to contest coverage under the contract or the contract itself. If revoked, Colonial Life may not be able to evaluate my claim or eligibility for benefits. I may revoke this authorization by sending written notice to: Colonial Life & Accident Insurance Company, Claims Department, P. O Box 100195, Columbia, SC 29202-3195.

You may refuse to sign this form; however, Colonial Life may not be able to evaluate and administer your claim. I am the individual to whom this authorization applies or that person's legal Guardian, Power of Attorney Designee, Conservator, Beneficiary or personal representative.

X_____ XXX-XX-_____ _____
(Signature) (Social Security Number — last 4 digits) (Date of Birth)

_____ _____
(Printed name of individual subject to this disclosure) (Date Signed)

If applicable, I signed on behalf of the insured as _____(indicate relationship).
If legal Guardian, Power of Attorney Designee, Conservator, Beneficiary or personal representative.

_____ _____ _____
(Printed name of legal representative) (Signature of legal representative) (Date Signed)

Colonial Life products are underwritten by Colonial Life & Accident Insurance Company, for which Colonial Life is the marketing brand.