



National Teachers Associates
 Life Insurance Company
 Attn: Claims Department
 P.O. Box 2369 ♦ Addison, TX 75001-2369
 (972) 532-2100 ♦ (888) 671-6771 ♦ FAX: (972) 532-2192

List Policy Numbers Here

HEALTH, ACCIDENT & DISABILITY CLAIM FORM

INSTRUCTIONS FOR FILING PROOF OF LOSS

1. Complete each section on page 1 and 2 that applies, then sign and date the form on page 1. Unanswered items will generally cause a delay in processing.
2. Policyowner must sign if the patient is under age 18.
3. Have your doctor complete and sign the *Attending Physician's Statement* on page 2.
4. On a disability claim, the *Employer's Statement* and the *Attending Physician's Statement* must both be completed and signed.
5. You must submit itemized bills for each benefit claimed (e.g., itemized hospital bill, doctor bills, anesthesiologist bills, etc.)
6. All claims on cancer policies must be supported by a pathology report. (If a pathological diagnosis cannot be made, a clinical diagnosis is acceptable.)

Warning: 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 loss is guilty of a crime and may be subject to fines and confinement in state prison.

POLICYOWNER & PATIENT INFORMATION

Name of Policyowner				Social Security Number		Occupation	
Address			City		State	Zip + 4	
E-mail address			Phone Day ()		Evening ()		Cell ()
Name of Patient				Patient's Social Security Number		Relationship to Policyowner	
Patient's Date of Birth	Patient's Height	Patient's Weight	Patient's Sex	Patient's Phone		Day ()	
/ /	ft. in.	lbs.	<input type="checkbox"/> M <input type="checkbox"/> F			Evening ()	
Name of Patient's Primary Physician		Address		State	Zip	Phone: ()	
		City				Fax: ()	

HISTORY OF PRESENT ACCIDENT • DISABILITY • SICKNESS

IF ACCIDENT/INJURY

Date of accident/injury: ___/___/___ at ___ a.m. / p.m.

How did the accident/injury occur? _____

Where did the accident/injury occur? _____

Describe injuries: _____

IF DISABLED

From ___/___/___ through ___/___/___.

Date you last worked: ___/___/___ Date released to return to work: ___/___/___.

IF SICKNESS

Date of sickness: ___/___/___ at ___ a.m. / p.m. When did symptoms first appear? ___/___/___.

Nature of sickness: _____

Has patient ever had the same or similar condition? Yes No If "Yes" give details.

Date: ___/___/___ Reason: _____ Doctor: _____ Hospitalized? Yes No

Has patient been treated for anything else within the past two years? Yes No If "Yes" give details.

Date: ___/___/___ Reason: _____ Doctor: _____ Hospitalized? Yes No

Date: ___/___/___ Reason: _____ Doctor: _____ Hospitalized? Yes No

IF DISABLED

From ___/___/___ through ___/___/___.

Date you last worked: ___/___/___ Date released to return to work: ___/___/___.

IF WELLNESS BENEFIT Please do not use this form. Please Complete Wellness Claim Form 75-321-CA.

I represent that all information on this form is true and correct.

(Signed) Patient _____

Date ___/___/___

(Signed) Policyowner _____

Date ___/___/___

POLICY OWNER'S NAME	
D.O.B	POLICY #

HEALTH, ACCIDENT & DISABILITY CLAIM FORM

ATTENDING PHYSICIAN'S STATEMENT

Date of First Symptom (if sickness) OR Date of injury _____ / _____ / _____	Date first consulted for this condition _____ / _____ / _____	Has patient ever had same or similar symptoms? <input type="checkbox"/> Yes <input type="checkbox"/> No Date: _____ / _____ / _____
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Name & Address of Referring Physician _____

Name & Address of Hospital where services rendered (if applicable)	Admitted _____ / _____ / _____	Discharged _____ / _____ / _____
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Diagnosis or Nature of Sickness or Injury _____ ICD-9 Code _____

1. _____

2. _____

3. _____

Date of Service	Place of Service	CPT Code	Describe Medical Procedures and Services Provided	ICD-9 Code	Charges

For Disability Claims also complete this section

Physical Impairment (As defined in the Federal Dictionary of Occupational Titles)

- Class 1 - No limitation of functional capacity; capable of heavy work. No restrictions. (0-10%)
- Class 2 - Medium manual activity. (15-30%)
- Class 3 - Slight limitation of functional capacity; capable of light work. (35-55%)
- Class 4 - Moderate limitation of functional capacity; capable of clerical/administrative (sedentary) activity. (60-70%)
- Class 5 - Severe limitation of functional capacity; incapable of minimum (sedentary) activity. (75-100%)

Remarks: _____

Total Disability means being unable by reason of Sickness or Injury, to perform with reasonable continuity the substantial and material acts necessary to pursue your usual occupation in the usual or customary way.

Give dates of **Total Disability** (if applicable): From _____ / _____ / _____ to _____ / _____ / _____

If there were any dates of partial disability, please indicate: From _____ / _____ / _____ to _____ / _____ / _____

A partial disability is a disability other than a Total Disability (as defined above).

Date patient released to return to work: _____ / _____ / _____

Signature of Physician Date	Physician's Federal I.D. Number	Provider's Name, Address, Zip Code
Printed Physician's Name	Patient's Account Number	Phone: () _____ Fax: () _____

EMPLOYER'S STATEMENT

Date stopped work due to disability _____ / _____ / _____	Name and Address of Employer
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Date returned to work _____ / _____ / _____	Signature of Official Representative: _____ Title: _____ Phone: () _____ Date: _____ / _____ / _____ Fax: () _____
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National Teachers Associates Life Insurance Company
4949 Keller Springs Road • Addison, Texas 75001 • (888) 671-6771

Authorization for Release of Health-Related Information

This Authorization Complies with HIPAA Privacy Rule

By executing this Authorization, I authorize all health care providers that have been involved in my care, diagnosis or treatment (including, but not limited to, physicians, hospitals, clinics, medical practitioners, and other medically related facilities) to disclose my medical records (including, but not limited to, patient histories, progress notes, test results, x-rays and other diagnostic information) to employees of National Teachers Associates Life Insurance Company and affiliated entities involved in determining eligibility for an insurance policy or processing a claim. This Authorization may be required to obtain an insurance policy or to determine eligibility for benefits.

National Teachers Associates Life Insurance Company and affiliated entities may disclose my medical records and the information contained in those medical records to business associates, affiliated third parties, or other organizations (such as reinsurers), for the purposes stated above and as permitted by law. I also understand that when my medical records and the information contained in those medical records are disclosed pursuant to this Authorization, they may be re-disclosed and may no longer be protected by federal privacy laws.

I understand that I may revoke this Authorization in writing, except to the extent that National Teachers Associates Life Insurance Company or an affiliated entity has acted in reliance upon this Authorization. My revocation **in writing** must be submitted to:

National Teachers Associates Life Insurance Company
Attn: Director of Compliance
4949 Keller Springs Road • Addison, Texas 75001

This Authorization will expire two (2) years from the date that this Authorization is signed.

I understand that I have the right to a copy of this Authorization and I agree that a copy of this Authorization is as valid as the original.

Signature of Individual Whose Information is to be Disclosed

Date

Printed Name of Individual

Policy Number

