

CLAIM FORM

If you have any questions regarding our determination of your claim, or if you would like to appeal any determination, please contact our customer service department at 1-800-348-4489
8:15 A.M. to 4:30 P.M. Eastern Standard Time



The furnishing of this form, or its acceptance by the Company as proof, must not be construed as an admission of any liability on the part of the Company, nor a waiver of any of the conditions of the insurance contract.

This form is to be returned to our office at the end of each 30 days of disability or immediately if you have returned to work.

PLEASE PRINT CLEARLY AND COMPLETE FORM ENTIRELY IN ORDER TO AVOID A DELAY IN THE PROCESSING OF YOUR CLAIM.

A POLICYHOLDER Policy Number: _____ Present Occupation: _____

Employer Name (Company/Address) _____

1. Name: First _____ Middle _____ Last _____

Social Security Number _____ - _____ - _____ Date of Birth ____/____/____ Male Female

2. Work Number: (_____) _____ Average Monthly Earnings _____

PATIENT
3. Name First _____ Middle _____ Last _____

4. Date of Birth ____/____/____ Age _____ Male Female

5. This person is your _____ (ex: self, wife, son, etc.) Is he/she a full-time student? Yes No If yes, please submit proof of student status.

B Please attach itemized bill(s), including date(s) of service, diagnosis code(s), procedure codes(s) and charge(s)

6. What sickness or injury are you claiming? _____

6 a. Date you were first treated for your illness or injury. _____ Mo./Day/Yr. 6 b. Date you were last treated for your illness or injury. _____ Mo./Day/Yr.

7. Date of your accident or the date you first noticed the symptoms of your illness: _____ Mo./Day/Yr.

8. List all physician's seen in the past (5) years:

Name	Address	Phone	Specialty	Dates Consulted	Reason for Consult
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9. List all hospital confinements in the past five (5) years:

Name	Address	From/To	Reason Confined
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10. List all pharmacies used in the past (5) years:

IF ACCIDENTAL INJURY

11. (A) Where did it happen? _____ (B) Time of accident _____ a.m. p.m.

(C) Tell us exactly how your accident happened _____

(D) Did your injuries occur while you were working for pay or profit? Yes No On the job Off the job

If yes, please include a copy of your workers' compensation earnings.

C 12. I have been unable to work since: _____ Mo./Day/Yr. 13. I returned to work on a part-time full-time basis _____ Mo./Day/Yr.

14. Describe why you are unable to work: _____

15. Are you receiving Disability Benefits (Salary Continuation or Sick Pay) from any other source? If "yes," from whom? _____

Please submit a copy of your payment statement with this form.

Allstate Workplace Division is the marketing name for American Heritage Life Insurance Company (home office: Jacksonville, Florida – ahcorp.com). All products are underwritten by American Heritage Life Insurance Company, a wholly-owned subsidiary of The Allstate Corporation (home office: Northbrook, Illinois – allstate.com).

Important: To avoid delay, please sign authorization below.

Note: Due to Internal Revenue Service requirements concerning social security number verification and backup withholding requirements, this form is required to be completed prior to claim payment. Remember, it is a crime to fill out this form with facts you know are false or to leave out facts you know are relevant and important. Please refer to the notices below for notice specific to your state. Check to be sure that all information is correct before signing.

1. **Section 125:** Were the premiums for your **disability income policy** paid with pre-tax dollars under a Section 125 Plan? Yes No (if in doubt, please ask your employer.)

Taxpayer Identification Number Certification

2. Federal law requires us to send to the Internal Revenue Service a percentage of any income you may be entitled to unless you certify under penalties of perjury that you have shown your correct Social Security Number and you have not been notified that you are subject to any Internal Revenue Service backup withholding order.

Under penalties of perjury, I certify that:

- A. The Social Security Number shown in line (1) is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
B. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) The IRS has notified me that I am no longer subject to backup withholding, and
C. I am a U.S. person (including a U.S. resident alien).

I hereby authorize any licensed physician, medical practitioner, hospital, clinic, or other medically related facility, insurance company or other organization, institution or person that has any records or knowledge of me (or my dependents) to give such information to American Heritage Life Insurance Company or its designee. This authorization is valid for a period of 24 months from the date signed. I understand that I may revoke this authorization at any time by notifying American Heritage Life in writing of my desire to do so. A photographic copy of this authorization shall be as valid as the original, regardless of date signed. I understand that I or my representative may receive a copy of this authorization by supplying policy number (s) and Insured's name in a written request to the company.

The Internal Revenue Service does not require your consent to any provisions of this document other than the certification required to avoid backup withholding.

Sign here _____ Date: _____ Check here if address is new

Claimant

Street Address: _____ City: _____ State: _____ Zip: _____ Telephone No. () _____

NOTICE IN ALASKA, ARKANSAS, KENTUCKY, LOUISIANA, MAINE, NEW JERSEY, NEW MEXICO, AND VIRGINIA: Any 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.

NOTICE IN DELAWARE, IDAHO, INDIANA, MINNESOTA, NEW HAMPSHIRE, AND OKLAHOMA: Any person who knowingly and with intent to injure, defraud or deceive an insurance company files a claim containing false, incomplete or misleading information is guilty of a felony.

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

NOTICE IN 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.

NOTICE IN COLORADO: 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.

NOTICE IN 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.

NOTICE IN 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.

NOTICE IN PENNSYLVANIA: 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.

NOTICE IN DISTRICT OF COLUMBIA: 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.

NOTICE IN TENNESSEE: 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.

NOTICE IN 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.

ATTENDING PHYSICIAN'S STATEMENT

Patient's Name _____

Age _____

1. Diagnosis: _____

2. If condition is due to pregnancy, what is expected delivery date? Date – MO/DAY/YR _____
3. When did symptoms first appear or accident happen? Date – MO/DAY/YR _____
4. When did patient first consult you for this condition? Date – MO/DAY/YR _____
5. Has patient ever had same or similar condition? (If "yes," state when and describe) Yes No _____

6. Describe any other diseases or infirmity affecting present condition. _____

7. Nature of surgical or obstetrical procedure, if any (describe fully). _____

8. Is patient unable to perform job duties? Yes No If yes, from _____ through _____
9. What specific job duties is patient unable to perform? _____
- 9a. Specific RESTRICTIONS (What the patient should not do and why). Please quantify in hours, weight, etc. _____

- 9b. Specific LIMITATIONS (What the patient cannot do and why). _____

10. If retired or unemployed which activities of daily living (ADLs) is patient unable to perform? _____
11. Date patient last examined by you _____ Frequency of visits _____ weekly _____ monthly _____ other _____
12. Is patient _____ ambulatory _____ bed confined _____ house confined _____ other _____
13. If patient hospitalized, give name and address of hospital.
Hospital: _____ City: _____ State: _____
Date admitted – MO/DAY/YR: _____ Date discharged – MO/DAY/YR: _____
- 14a. When do you expect patient to resume partial duties? _____ Full duties? _____
MO/DAY/YR MO/DAY/YR
- 14b. If patient is unemployed or retired, on what date would you expect a person of like age, gender and good health to resume his/her normal and necessary activities?
MO/DAY/YR: _____
15. Is condition due to injury or sickness arising out of patient's employment? Yes No
If "yes," explain. _____
16. Name and address of referring physician if any.
Name _____ Address _____
City _____ State _____ Zip _____
17. Have you completed paperwork for any other insurance company? Yes No Social Security Disability? Yes No

Remember, it is a crime to fill out this form with facts you know are false or to leave out facts you know are relevant and important. Check to be sure that all information is correct before signing. Please refer to page 2 for notice specific to your state.

PHYSICIAN VERIFICATION

Signed _____, MD Date – MO/DAY/YR _____ Phone (____) _____
Street Address _____ City/Town _____
State/Province _____ Zip Code _____

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EMPLOYER'S STATEMENT

1. I hereby certify that _____ did not perform any part of his/her work from, _____ through, _____.

2. Did insured work light duty or part-time? Yes No If yes, give dates _____

3. Prior to inability to work, he/she worked _____ hours per week and is considered _____ exempt or _____ non-exempt.

4. When recovered, will he/she resume work? _____ If not why? _____

5. Is this a Workers' Compensation case? _____ Date Workers' Compensation benefits began _____
Name of Workers' Compensation Company _____

6. Section 125: Were the premiums for our disability income policy paid with pre-tax dollars under a Section 125 Plan? Yes No

7. Is the employee receiving or has he/she received continued pay? Yes No If yes, please complete the following:

<u>Pay Period</u>		<u>Amount</u>	<u>Source of Income</u>
<u>From</u>	<u>To</u>		
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

8. Has employee returned to work? Yes No If yes, give date _____
MO/DAY/YR

Remarks _____

Name of Employer _____ Date _____

Address _____

By _____ Official Position _____ Telephone number (____) _____