



# Medical Benefits – Claim Instructions

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 claim was provided by the applicant.

California Residents: For your protection, California law requires notice of the following: Any person who knowingly and with intent to defraud or deceive any insurance company files a statement of claim containing any materially false, incomplete or misleading information is guilty of a crime and may be subject to fines, confinement in a state prison and substantial civil penalties.

**Colorado Residents: An insurer or agent who knowingly provides false or misleading information to defraud a claimant regarding insurance proceeds must be reported to the Insurance Division.**

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.

**NOTE: INCOMPLETE CLAIM FORMS WILL BE RETURNED TO YOU FOR MISSING INFORMATION. THIS WILL DELAY THE PROCESSING OF THE CLAIM. FOR FASTER, EASIER SUBMISSION OF CLAIMS, THE PROVIDER MAY CONTACT THE AETNA CLAIM PROCESSING CENTER FOR INFORMATION REGARDING ELECTRONIC CLAIM SUBMISSIONS.**

## TO THE EMPLOYEE

1. Complete items one (1) through twenty-seven (27) in full. Be certain to sign the authorization to release information block (28).
2. If you wish to have your benefits for this claim paid directly to your physician or supplier, sign the block (29).
3. If you have submitted a request for benefits to another plan, including Medicare, attach a copy of the bills you submitted to the other plan and the explanation of benefits you received from the other plan.
4. Attach itemized bills or ask your health care provider to complete the applicable section on the reverse side. The bills must include:
  - patient's name
  - date(s) of service(s)
  - condition being treated
  - relationship to employee
  - type of service(s) renderedIf this information is missing, write it on the bill and sign your name.
5. If prescription drugs are covered under your plan, submit receipts or a Prescription Drug Record form. Receipt must contain:

|                               |                         |
|-------------------------------|-------------------------|
| - drug name                   | - strength              |
| - dose per/day                | - prescription number   |
| - charge                      | - quantity              |
| - purchase date               | - physician's name      |
| - nature of illness or injury | - pharmacy name/address |

This information can be copied from the prescription bottle or box.
6. Retain copies of your bills for your record.
7. Send the completed benefits request and the bills to the Aetna Life Insurance Company office that services your employer.

## TO THE PHYSICIAN OR SUPPLIER

1. Complete items thirty (30) through forty-eight (48) in full.
2. If the employee indicates that benefits should be paid directly to the physician or supplier, then these benefits will be sent directly to you with an information copy of the transactions to the employee.



# Medical Benefits Request

## TO BE COMPLETED BY EMPLOYEE

|   |  |  |  |  |  |
|---|--|--|--|--|--|
| 1. Employer's Name  |  | 2. Policy/Group Number   |  | Branch Number  |  |
| 3. Employee's Social Security Number  |  | 4. Employee's Name   |  | 5. Employee's Birthdate (MM/DD/YYYY)   |  |
| 6. <input type="checkbox"/> Active <input type="checkbox"/> Retired<br>Date of Retirement   |  | 7. Employee's Address (include zip code) <input type="checkbox"/> Address is new   |  | 8. Employee's Daytime Telephone Number<br>( )                                      |  |
| 9. Patient's Name   |  | 10. Patient's Social Security Number   |  | 11. Patient's Birthdate (MM/DD/YYYY)   |  |
| 12. Patient's Relationship to Employee<br><input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other   |  | 13. Patient's Address (if different from employee)   |  | 14. Patient's Sex<br><input type="checkbox"/> Male <input type="checkbox"/> Female |  |
| 15. Full Time Student<br><input type="checkbox"/> No <input type="checkbox"/> Yes   |  | 16. Patient's Expected Graduation Date   |  | 17. Name of School<br>City   |  |
| 18. Patient's Marital Status<br><input type="checkbox"/> Married <input type="checkbox"/> Single  |  | 19. Is patient employed?<br><input type="checkbox"/> No <input type="checkbox"/> Yes   |  | 20. Name & Address of Employer   |  |
| 21. Are any family members expenses covered by another group health plan, group pre-payment plan (Blue Cross-Blue Shield, etc.), no fault auto insurance, Medicare or any federal, state or local government plan?<br><input type="checkbox"/> No <input type="checkbox"/> Yes  |  | 22. If yes, list policy or contract holder, policy or contract number(s) and name/address of insurance company or administrator: |  |  |  |
| 23. Member's Social Security Number   |  | 24. Member's Name  |  | 25. Member's Birthdate (MM/DD/YYYY)  |  |
| 26. Is claim related to an accident?<br><input type="checkbox"/> No <input type="checkbox"/> Yes If yes, date _____ time _____ <input type="checkbox"/> am <input type="checkbox"/> pm  |  | 27. Is claim related to employment?<br><input type="checkbox"/> No <input type="checkbox"/> Yes                                  |  |  |  |
| 28. To all providers of health care:<br>You are authorized to provide Aetna Life Insurance Company or one of its affiliated companies ("Aetna"), and any independent claim administrators and consulting health professionals and utilization review organizations with whom Aetna has contracted, information concerning health care advice, treatment or supplies provided the patient (including that relating to mental illness and/or AIDS/ARC/HIV). This information will be used to evaluate claims for benefits. Aetna may provide the employer named above with any benefit calculation used in payment of this claim for the purpose of reviewing the experience and operation of the policy or contract. This authorization is valid for the term of the policy or contract under which a claim has been submitted. I know that I have a right to receive a copy of this authorization upon request and agree that a photographic copy of this authorization is as valid as the original.<br>Patient's or Authorized Person's Signature _____ Date _____ |  |  |  |  |  |
| 29. I authorize payment of medical benefits to the physician or supplier of service.<br>Patient's or Authorized Person's Signature _____ Date _____   |  |  |  |  |  |

## TO BE COMPLETED BY PHYSICIAN OR SUPPLIER

|  |  |  |  |   |  |  |  |
|--|--|--|--|---|--|--|--|
| 30. Date of illness (first symptom) or injury (accident) or pregnancy (LMP)                                  |  | 31. Date first consulted you for this condition          |  | 32. If patient has had similar illness or injury, give dates  |  | 33. If an emergency check here<br><input type="checkbox"/> emergency |  |
| 34. Date patient able to return to work  |  | 35. Date of total disability<br>from _____ through _____ |  | 36. Date of partial disability<br>from _____ through _____  |  |  |  |
| 37. Name of referring physician (e.g., Public Health Agency)   |  |  |  | 38. For services related to hospitalization give hospitalization dates<br>admitted _____ discharged _____ |  |  |  |
| 39. Name & address of facility where services rendered (if other than home or office)                        |  |  |  |   |  |  |  |
| 40. Diagnosis or nature of illness or injury (please indicate primary and secondary)<br>1.<br>2.<br>3.<br>4. |  |  |  |   |  |  |  |

## 41. Procedures, Medical Services, Supplies Furnished

| Date of Service | Place of Service* | Procedure Code Identify** | Description of Service | Type of Service † | Charges | Days or Units | Diagnosis Code †† | Administrative Use Only |
|-----------------|-------------------|---------------------------|------------------------|-------------------|---------|---------------|-------------------|-------------------------|
|                 |                   |                           |                        |                   |         |               |                   |                         |
|                 |                   |                           |                        |                   |         |               |                   |                         |
|                 |                   |                           |                        |                   |         |               |                   |                         |
|                 |                   |                           |                        |                   |         |               |                   |                         |

|   |  |                             |  |  |  |
|---|--|-----------------------------|--|--|--|
| 42. Physician's Name & Address (include zip code) |  | 43. Telephone Number<br>( ) |  | 44. Enter the taxpayer identifying number to be used for 1099 reporting purposes. You are required under authority of law to furnish your taxpayer identifying number. |  |
|   |  | 45. Patient Account Number  |  | 46.<br>Total charge \$ _____<br>Amount paid \$ _____<br>Balance due \$ _____   |  |
| 47. Physician's or supplier's signature           |  |                             |  | 48. Date   |  |

### \* Place of Service Codes:

- 1 - (IH) - Inpatient Hospital
- 2 - (OH) - Outpatient Hospital
- 3 - (O) - Office Visit
- 4 - (H) - Patient Home
- 5 - - Day Care Facility (PSY)
- 6 - - Night Care Facility (PSY)
- 7 - (NH) - Nursing Home

- 8 - (SNF) - Skilled Nursing Facility
- 9 - - Ambulance
- 0 - (OL) - Other Location
- A - (IL) - Independent Laboratory
- B - - Other Medical Surgical Facility
- C - (RTC) - Residential Treatment Center
- D - (STF) - Specialized Treatment Facility

### † Type of Service Codes:

- 1 - Medical Care
- 2 - Surgery
- 3 - Consultation
- 4 - Diagnostic X-Ray
- 5 - Diagnostic Laboratory
- 6 - Radiation Therapy
- 7 - Anesthesia

- 8 - Assistance at Surgery
- 9 - Other Medical Service
- 0 - Blood or Packed Red Cells
- A - Used DME
- M - Alternate Payment for Maintenance Dialysis
- Y - Second Opinion on Elective Surgery
- Z - Third Opinion on Elective Surgery