

# Sun Life Assurance Company of Canada

## Wellness Screening Benefit Reimbursement Form



Policy number: \_\_\_\_\_

Claiming benefits for:  Insured

Billing group number: \_\_\_\_\_

Spouse/partner

### Instructions for the plan administrator

To avoid delays in processing, please do the following:

- Have the claimant complete and sign all applicable sections of the form.
- Include the employee and claimant Social Security number(s)
- Include the policy number
- Include a copy of the screening results, your medical bill or any other documents to verify the screening/examination was completed. Please be certain that these documents include the patient's name and date of birth. Proof must be provided to us no later than 15 months after the date of the screening.

Note: All Wellness benefits will be issued as payable to the employee.

### 1 Employer information

Employer name		Employer phone number	
Employer street address	City	State	Zip code
Person completing this form	E-mail address		

Does the employee have Wellness Screening Benefit coverage? .....  Yes  No

### 2 Employee information

Employee name		<input type="checkbox"/> M <input type="checkbox"/> F	Social Security number	Date of birth (m/d/y)	
Employee street address	City	State	Zip code		
Employee home phone number	Employee work phone number	E-mail address			

### 3 Claimant information

Complete this section only if the claimant is not the employee.

Claimant name		<input type="checkbox"/> M <input type="checkbox"/> F	Social Security number	Date of birth (m/d/y)	
Claimant street address	City	State	Zip code		
Claimant home phone number	Claimant work phone number				

#### 4 Wellness screening information

Please check off the appropriate box(es) that best describes the test(s) you had completed. Be sure that the results documentation also includes the bulleted items below.

- Patient's name
- Date of birth
- Date of test
- Name of test/exam that was performed

Employee	Spouse/partner	
<input type="checkbox"/>	<input type="checkbox"/>	Breast cancer screening (clinical breast exam, mammography, MRI, thermography, ultrasound)
<input type="checkbox"/>	<input type="checkbox"/>	Colorectal cancer screening (fecal occult blood test, colonoscopy, sigmoidoscopy)
<input type="checkbox"/>	<input type="checkbox"/>	Lipid panel (cholesterol, triglycerides, HDL, LDL)
<input type="checkbox"/>	<input type="checkbox"/>	Pap smear
<input type="checkbox"/>	<input type="checkbox"/>	Prostate cancer screening (digital rectal exam, PSA blood test)
<input type="checkbox"/>	<input type="checkbox"/>	Standard blood chemistry profile
<input type="checkbox"/>	<input type="checkbox"/>	Diabetes tests (fasting blood glucose test, hemoglobin A1c)
<input type="checkbox"/>	<input type="checkbox"/>	Electrocardiogram (ECG)—resting or stress

#### 5 Fraud warnings

**General fraud warning:** 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.

**AK:** 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.

**AL:** 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 restitution fines or confinement in prison, or any combination thereof.

**AR, LA, MA, MN, NM, RI, TX and WV:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

**AZ:** 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.

**CA:** 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.

**CO:** 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.

**DC:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

**DE, ID and IN:** 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.

**FL:** 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.

**KS:** 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 may be guilty of insurance fraud as determined by a court of law.

## 5 Fraud warnings, continued

**KY:** 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.

**MD:** 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.

**ME, TN and WA:** 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.

**NH:** 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 in RSA 638:20.

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

**OH:** 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.

**OK:** WARNING: Any person who knowingly, and with intent to injure, defraud or deceive any insurer, makes any claim for the proceeds of an insurance policy containing any false, incomplete or misleading information is guilty of a felony.

**OR and VA:** 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 may have violated state law.

**PR:** 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 by a fine of not less than five thousand dollars (\$5,000) and not more than ten thousand dollars (\$10,000), or a fixed term of imprisonment for three (3) years, or both penalties. Should aggravating circumstances be 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.

**VT:** Any person who knowingly presents a false statement in an application for insurance may be guilty of a criminal offense and subject to penalties under state law.

## 6 Signature

I/we understand that all or part of the information provided may be communicated between the Sun Life Assurance Company of Canada (the "Company") and its affiliates. The information provided may be shared to process transactions that concern any coverage I may have requested or have with the Company or as permitted by law.

Claimant name	Policy number
Claimant signature or authorized representative X	Date

## Contact us



### By mail

Sun Life Assurance Company of Canada  
Wellness Benefit Insurance  
P.O. Box 81830  
Wellesley Hills, MA 02481



[www.sunlife.com/us](http://www.sunlife.com/us)



Customer Service **800-247-6875** M–F 8:00 a.m. – 8:00 p.m., ET

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