iA Financial Group

CLAIM FORM
MEDICAL EXPENSES

GROUP INSURANCE

Depending on your province of residence, please submit form to:

Quebec
Group Health and Dental Claims
PO Box 800, Station Maison de la Poste
Montreal, Quebec H3B 3K5

All other provinces
Group Health and Dental Claims
PO Box 4643, Station A
Toronto, Ontario M5W 5E3

☐ **Claim** ☐ **Estimate**

1. MEMBER INFORMATION

Member's first name _____ Last name _____

Policy no. _____ Certificate no. _____

Company/Association name _____

Date of birth (Y Y Y Y M M D D) _____ Gender: ☐ M ☐ F Language: ☐ English ☐ French

Preferred method of contact for the purpose of claims resolution:

☐ Phone _____ ☐ Email address _____

Complete this section only if your address has recently changed.

Member's address _____ Postal code _____

2. COORDINATION OF BENEFITS (COMPLETE THIS SECTION ONLY IF YOUR SPOUSE OR DEPENDENT CHILDREN ARE COVERED BY ANOTHER GROUP PLAN.)

— If your spouse or dependent children are covered under their own group plan for medical benefits, the claim must first be submitted to his/her group insurance carrier. You may subsequently submit a claim to iA Financial Group for the unpaid portion, if applicable.

— If your insured dependent children are covered under your plan as well as under your spouse's group plan, the claim must be submitted to the plan of the parent whose birthday comes first during a calendar year.

Is your spouse or dependent child(ren) covered by another group plan for medical benefits? ☐ No ☐ Yes, please complete the information below.

Health coverage: ☐ Individual ☐ Family, name of insured spouse/child _____ Date of birth (Y Y Y Y M M D D) _____

Are you claiming any expenses for your spouse or dependent children that are NOT covered under their plan?

☐ No ☐ Yes, please specify the benefit: _____

If your spouse's group insurance carrier is also iA Financial Group, do you want us to apply coordination of benefits?

☐ No ☐ Yes, please specify: Spouse's policy no. _____ Certificate no. _____

3. MEDICAL EXPENSES

— To ensure the complete resolution of your claim, please provide the required information as outlined on the last page of this form.

— **Attach the original receipts and keep a copy for income tax purposes and the coordination of benefits. The receipts will not be returned.**

Name (One line per claimant)	Relationship to member	Date of birth (Y Y Y Y M M D D)	For children **18** and over (or according to your plan) Handicapped child No Yes	Full-time student No Yes	Name of school	Total expenses (per claimant)
			☐ ☐	☐ ☐		$
			☐ ☐	☐ ☐		$
			☐ ☐	☐ ☐		$
			☐ ☐	☐ ☐		$

If the claim is the result of an accident, please specify type of accident (details on the last page of this form, if applicable):

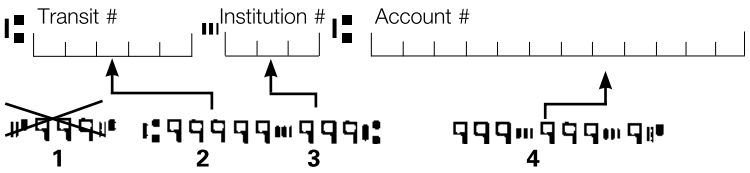
☐ Work ☐ Motor vehicle ☐ Other _____ Date of accident (Y Y Y Y M M D D) _____

4. DIRECT DEPOSIT AND NOTIFICATION

Direct deposit of your health and/or dental claim reimbursements and notification of claim processing

Complete only when signing up for direct deposit or to update your information.

Banking information for direct deposit:



1. Cheque number (do not write this number).
2. Transit number (5 digits).
3. Financial institution number (3 digits).
4. Account number up to 12 digits. The format may vary from one financial institution to another. **Indicate all numbers and only the numbers.**

Email address for notification: _____ ☐ Personal ☐ Work

⚠ **To receive notifications, you must provide your email address and your banking information.**

☐ I do not want to receive notification

You can view the status and details of your health and/or dental claims via My Client Space (ia.ca/myaccount), our secure website, at any time.

5. MEMBER CONFIRMATION/AUTHORIZATION

I HEREBY CONFIRM:

1. that the information contained in this claim form is true and complete to the best of my knowledge.
2. that the persons for whom I am making a claim are eligible and that if the claim is being made on behalf of a dependent, I am **AUTHORIZED** to disclose information about him/her with respect to the claim.

I AUTHORIZE Industrial Alliance Insurance and Financial Services Inc. ("iA Financial Group") to deposit in my bank account, using the banking information I have provided above, any amounts payable in regards to a health and/or dental claim that I submit under my group insurance plan.

I AGREE that this authorization will apply until such time as I submit a written request to the contrary to iA Financial Group.

I UNDERSTAND that iA Financial Group will have no further obligation with regard to the claims paid.

I ALSO UNDERSTAND that iA Financial Group can, without prior notice, terminate the direct deposit of my claims payments. This authorization takes effect on the date indicated below and will be valid for all other active bank accounts at this or any other financial institution that I may name in the future.

Furthermore, **I UNDERSTAND** and **AGREE** that if I provide iA Financial Group with incorrect banking information or if I fail to notify iA Financial Group of any change in my banking information and, as a result of this error or omission, the amount of a paid claim is deposited into the wrong bank account, iA Financial Group cannot be held responsible or liable for this error or omission or be obligated to reimburse me if iA Financial Group is unable to recover the amount that was paid into the wrong account.

On behalf of myself and my dependents:

1. **I CONSENT TO THE RELEASE** of the information contained in this claim form to iA Financial Group, its employees, agents, reinsurers, service providers and other organizations working with iA Financial Group for the purposes of underwriting, administration and processing of the claim.
2. **I AUTHORIZE** any healthcare provider or professional, medical organization, insurance or reinsurance company, workers' compensation board, the policyholder, my employer, as well as any other person, private or public organization or institution to disclose to iA Financial Group, its employees, agents, reinsurers and service providers any information regarding the treatment and expenses incurred which they may need in the assessment of the claim.
3. **I UNDERSTAND AND AUTHORIZE** that in the event there is reasonable suspicion of or any evidence of fraud or abuse regarding the claim, iA Financial Group will have the right to use and exchange any information related to the claim with any relevant regulatory, investigative or government body, any healthcare provider or professional medical organization, insurance company or reinsurer, the policyholder, my employer or any other party as provided by law for the purpose of investigating any such fraud or abuse.

I AGREE that a photocopy of this Confirmation/Authorization shall be as valid as the original.

Member's signature **X** _____ Date Y Y Y Y M M D D

For more information, please consult your benefits booklet.

GENERAL INFORMATION	
iA Financial Group forms	— Other claim forms, including HSA forms, questionnaires and more information can be found on our website at **ia.ca** and in **My Client Space**.
Coordination of benefits	— This establishes the order in which two or more insurance carriers will pay benefits for the same claim (maximum 100%). — For detailed instructions and scenarios regarding coordination of benefits, please refer to the *Coordination of Benefits* guide available on our website.
Claims related to a work or motor vehicle accident	— If your claim is related to a work accident, submit the initial claim to your provincial workers' compensation board if applicable. — If your claim is related to a motor vehicle accident, submit the initial claim to your motor vehicle insurance, if applicable.
Expenses incurred outside your province of residence	— Expenses incurred outside the province of residence are handled by CanAssistance. For inquiries or questions, contact CanAssistance at **1-800-203-9024**. The travel insurance claim forms from CanAssistance, specific to your province of residence, can be found on our website at **ia.ca**.

CLAIM REQUIREMENTS	
Original detailed receipts should include the following and must be submitted for each claim:	— The claimant's full name — The date, cost and type of treatment — The provider's name and professional title
Paramedical provider's services (e.g. massage therapist, physiotherapist, chiropractor, etc.)	— Your group insurance policy may require a medical referral
Foot orthotics	The medical referral and the receipt must include: — The diagnosis describing the symptoms and the medical need — The name and credentials of the qualified health professional Quebec: Doctor or Podiatrist Other provinces: Chiropodist (in Ontario only), Certified Orthotist, Certified Pedorthist, Doctor or Podiatrist — The casting technique — The name and credentials of the certified foot orthotics specialist or laboratory Quebec: Podiatrist (for foot orthotics only) or licensed laboratory where an Orthotist works Other provinces: Chiropodist (in Ontario only), Certified Orthotist, Certified Pedorthist or Podiatrist
Orthopedic shoes	The medical referral and the receipt must include: — The diagnosis describing the symptoms and the medical need — The name and credentials of the qualified health professional (see the list by province under Foot orthotics for more information) — The name and credentials of the certified orthopedic shoe specialist or laboratory who custom-made or modified the orthopedic shoes (For more information see the list by province under Foot orthotics) — A detailed list of the permanent modifications made to the shoes — A description of how the shoes were custom-made
Hospital beds & wheelchairs	— The medical referral with diagnosis describing the symptoms and the medical need — The expected length of time required — The purchase date of previous appliance, if applicable
Orthopedic appliances (e.g. knee & back braces)	— The medical referral with diagnosis indicating the symptoms and the medical need — The expected length of time required
Nursing care	— The nursing care benefit requires pre-approval from us. Download and complete the questionnaire and submit it to iA Financial Group. You can find the questionnaire on our website.

If you have any questions or concerns, please contact Customer Service at 1-877-422-6487.