

The Lincoln National Life Insurance Company
PO Box 2609, Omaha, NE 68103-2609
Toll Free (800) 423-2765 Fax (888) 735-7636
LincolnFinancial.com

Please call our Customer Service Center at 1-800-423-2765 if you have any questions about benefits or how to file your claim.

Follow these instructions to complete this form.

1. Complete **Section A, D and E** in full.
2. Complete **Section B** if treatment is due to an accident. If treatment is due to an illness, skip to and complete **Section C**.
3. Complete and sign **Section F**.
4. Have your physician complete **Section G** in full and sign.
5. Please provide an itemized bill from the hospital, lab reports, radiology reports, pathology reports, clinical diagnosis, and any other medical record documentation to support your claim. If the patient is deceased, please provide a copy of the death certificate. Retain copies for your records. Send the completed form and bills to:

The Lincoln National Life Insurance Company
PO Box 2609, Omaha, NE 68103-2609
Fax: (888) 735-7636
Email: fileclaim@lfg.com

Incomplete forms or missing documentation may delay processing of the claim.

Section A - Employee and Patient Information (to be completed by Employee)

Employee Information

Employer Name:	Policy Number:
Employee's Name: (First, Middle, Last) _____/_____/_____	
Employee's Birthdate: (MM/DD/YYYY) _____/_____/_____	Employee's Work ID or Social Security Number: _____
Employee's Address: <input type="checkbox"/> Check if address is new _____ _____ _____	
City/State/Zip: _____/_____/_____	Employee's Telephone Number: _____-_____-_____ _____-_____-_____
Employee's e-mail: _____	Employee's Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female

Patient Information

Patient Name: (First, Middle, Last, if not employee) _____/_____/_____	
Relationship to Employee: <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other	Patient's Birthdate: (MM/DD/YYYY) _____/_____/_____
Patient's Gender: (if not employee) <input type="checkbox"/> Male <input type="checkbox"/> Female	Patient's Telephone Number: _____-_____-_____ _____-_____-_____

Please check the box(es) that best describes your claim. Please be advised, some benefits may not be covered under your plan.

Admission & Confinement Benefits

- ☐ Hospital Admission
- ☐ Hospital Intensive Care Unit (ICU) Admission
- ☐ Hospital Confinement
- ☐ Hospital Intensive Care Unit (ICU) Confinement
- ☐ Rehabilitation Facility
- ☐ Substance Abuse Treatment
- ☐ Mental Disorder Treatment
- ☐ Newborn Care
- ☐ Birth Center

Outpatient Benefits

- ☐ Emergency Care
- ☐ Office Visit
- ☐ Urgent Care
- ☐ Walk-In Clinic
- ☐ Telemedicine
- ☐ Observation Unit

Surgery Benefits

- ☐ Inpatient Surgery
- ☐ Outpatient Surgery

Lab and Diagnostic Benefits

- ☐ Lab and X-Ray
- ☐ Diagnostic Imaging

Assistance & Recovery Benefits

- ☐ Air or Water Ambulance Transportation
- ☐ Ground Ambulance Transportation

Enhancement Benefits

- ☐ Hospital Neonatal Intensive Care Unit (NICU) Admission Increase
- ☐ Hospital Neonatal Intensive Care Unit (NICU) Confinement Increase

Section B - Accident Details

Date of Accident: (MM/DD/YYYY) ____/____/____	Where did the accident happen? _____
Is Accident related to employment? <input type="checkbox"/> Yes <input type="checkbox"/> No	Were you driving? <input type="checkbox"/> Yes <input type="checkbox"/> No
Is Accident an auto accident? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, please provide a police report. _____
Explain the injuries and how the accident happened: _____ _____	

Section C - Illness Details

Date Symptoms Began: (MM/DD/YYYY) ____/____/____	Briefly explain the primary reason for seeking treatment: _____
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Section D - Hospitalization Details

Were you hospitalized? <input type="checkbox"/> Yes <input type="checkbox"/> No	Admission Date: (MM/DD/YYYY) ____/____/____ AM/PM	Discharge Date: (MM/DD/YYYY) ____/____/____ AM/PM
Name of Hospital: _____		Hospital Telephone Number: ____-____-____
Hospital Address: _____		City/State/Zip: _____

Section E - Payment Details

Please select a method of payment to receive your benefits. If no method of payment is selected, you will receive a check for your benefits.

Select Payment Type: ☐ Direct deposit into my account
 ☐ Send me a check

9-Digit Routing Number: _____

Account Number: _____

Financial Institution Name: _____

Banking Type: ☐ Personal ☐ Business

Account Type: ☐ Checking ☐ Savings

Section F - Authorization For Release of Information

1. In connection with a claim for benefits, I (the undersigned) **authorize** any physician, medical professional, pharmacist or other provider of health care services, hospital, clinic, other medical or medically related facility; insurance or reinsurance company; government agency; department of labor; acquaintance; group policyholder; employer; or policy or benefit plan administrator to release information from the records of:

Patient's Name: (First, Middle, Last) _____ / _____ / _____

Patient's Birthdate: (MM/DD/YYYY) _____ / _____ / _____ Social Security Number: XXX-XX-_____

2. **Information to be released (hereinafter referred to as "My Information"):**
- data or records regarding my medical history, treatment, prescriptions, consultations [including medical and psychological reports, records, charts, notes (excluding psychotherapy notes), x-rays, films or correspondence, and any medical condition I may now have or have had];
 - any information regarding insurance coverage, claims or benefits; and/or
 - any information, data or records regarding my activities (including records relating to my Social Security, Workers' Compensation, retirement income, financial information, earnings and employment history).
3. **Information to be released to:** The Lincoln National Life Insurance Company ("Lincoln")
PO Box 2609
Omaha, NE 68103-2609
4. **I understand My Information will be used by Lincoln to evaluate and administer my claim for benefits. I also authorize Lincoln to release My Information as follows:**
- to its reinsurer, or other persons or organizations performing business or legal services in connection with my claim(s); or
 - to a vendor, approved by Lincoln, which specializes in the application for Social Security Disability Benefits
 - to vendors/consultants providing me with wellness, disability or leave related services as part of an employer sponsored benefit plan; or
 - for self-insured disability plans only, to my employer; or
 - for fully insured plans, I understand the information obtained with this Authorization may be used in discussions between Lincoln and my employer regarding my functional capacity, and any related restrictions and limitations, in order to facilitate my return to work; or
 - as otherwise may be required by law or as I may further authorize.
5. I understand My Information may be subject to re-disclosure by the recipient and may no longer be protected by federal or state law. For Colorado claims, the disclosed information may not be re-disclosed or reused by the recipient under Colorado law.
6. I understand that I may revoke this Authorization in writing at any time, except to the extent Lincoln has taken action in reliance on this Authorization. To initiate revocation of this Authorization, direct all correspondence to Lincoln at the above address. If written revocation is not received, this Authorization will be considered valid for a period of time not to exceed 24 months from the date of my signature below, or the duration of my claim for benefits, whichever is shorter.
7. A photocopy of this Authorization is to be considered as valid as the original. I am entitled to receive a copy of this Authorization.

PATIENT SIGNATURE: _____ **DATE:** (MM/DD/YYYY) _____ / _____ / _____

Legal representative (nearest relative, legal guardian, or appointed representative) to sign only if patient is a minor, legally incompetent, or deceased. Power of attorney or guardianship must be attached.

PRINT NAME: (First, Middle, Last) _____ / _____ / _____

Relationship to Patient: (if legal representative signing)

ADDRESS:

Street: _____

City/State/Zip: _____ / _____ / _____

TELEPHONE NUMBER: _____ - _____ - _____

Section G - Physician's Statement (to be completed by Physician)

Patient's Name: (First, Middle, Last) _____/_____/_____	
Patient's Birthdate: (MM/DD/YYYY) _____/_____/_____	Patient's relationship to employee: <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Life Partner <input type="checkbox"/> Child
Patient's Address: _____ _____	
City/State/Zip: _____/_____/_____	
Primary Diagnosis with ICD10 code: _____	Secondary Diagnosis with ICD10 code: _____
Is this condition the result of an accidental injury? <input type="checkbox"/> Yes <input type="checkbox"/> No Date of Accident/Injury: ____/____/____ If Yes, please describe how the accident occurred: _____	
Is this condition the result of an illness? <input type="checkbox"/> Yes <input type="checkbox"/> No Date first treated: ____/____/____	
Is the patient's condition work related? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, explain: _____	
Was the patient treated in the ER? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, date seen in ER: ____/____/____ If Yes, name of hospital: _____	
Were x-rays performed? <input type="checkbox"/> Yes <input type="checkbox"/> No Date: ____/____/____ Results: _____	
MRI/CT performed? <input type="checkbox"/> Yes <input type="checkbox"/> No Date: ____/____/____ Results: _____	
Additional treatment date(s) for this condition: (MM/DD/YYYY) ____/____/____ ____/____/____ ____/____/____ ____/____/____	
Name of Hospital: _____	
Hospital Address (Street/City/State/Zip): _____ _____	
Hospital Telephone Number: _____-_____-_____ Hospital Fax Number: _____-_____-_____	Dates Confined: (MM/DD/YYYY) ____/____/____ through ____/____/____ Admission Time: ____AM/PM Discharge Time: ____AM/PM ____/____/____ through ____/____/____ Admission Time: ____AM/PM Discharge Time: ____AM/PM
Hospital Stay Type: (if applicable) <input type="checkbox"/> Inpatient <input type="checkbox"/> Outpatient <input type="checkbox"/> Observation	Was the patient admitted to the ICU? <input type="checkbox"/> Yes <input type="checkbox"/> No
Nature of Surgical Procedure: (Describe fully, and provide CPTS and/or operative report) _____ _____	

Section G - Physician's Statement (to be completed by Physician) (Continued)

Has the patient ever had same or similar condition? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, please provide dates: (MM/DD/YYYY) ____/____/____ ____/____/____
Predisposing risk factors or conditions related to the diagnoses, with dates: _____ _____ ____/____/____ ____/____/____ ____/____/____	
Was this patient referred to you by another physician? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, please provide the following: Physician's Name: _____/_____ Address: _____ City/State/Zip: _____/_____/_____	

Physician Verification**Fraud Notice:** The statements on the previous page are true and complete to the best of my knowledge and belief.

Print Full Name: (First, Middle, Last) _____/_____/_____	
Medical Specialty: _____	
Phone Number: ____/____/____	Fax Number: ____-____-____
Address: _____	
City/State/Zip: _____	
Signature of Physician: _____	Date: (MM/DD/YYYY) ____/____/____
Tax ID Number: _____	NPI Number: _____
Are you, the physician, related to the patient? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, what is the relationship? _____	

FRAUD NOTICES. For your protection, certain states require that the following notices appear on this form.

Alabama. 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.

Alaska. 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.

Arizona. For your protection Arizona law requires the following statement to appear on this form. Any person who knowingly presents a false claim for payment of a loss is subject to criminal and civil penalties.

Arkansas, Louisiana, Rhode Island and West Virginia. 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.

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

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 Services.

Delaware. 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.

District of Columbia. 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.

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.

Kansas. A person may be guilty of fraud as determined by a court of law, if he or she submits an application or claim containing a false or deceptive statement with intent to defraud (or knowing that he or she is helping to defraud) an insurance company.

Kentucky. Any person who knowingly and with the intent to defraud an 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.

Maine. It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties may include imprisonment, fines or a denial of insurance benefits.

Maryland. 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.

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

New Mexico. 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 civil fines and criminal penalties.

North Carolina. Any person who, with intent to injure, defraud, or deceive an insurer or insurance claimant: (1) presents or causes to be presented a written or oral statement, including computer-generated documents as part of, in support of, or in opposition to, a claim for payment or other benefit pursuant to an insurance policy, knowing that the statement contains false or misleading information concerning any fact or matter material to a claim, or (2) assists, abets, solicits, or conspires with another person to prepare or make any written or oral statement that is intended to be presented to an insurer or insurance claimant in connection with, in support of, or in opposition to, a claim for payment or other benefit pursuant to an insurance policy, knowing that the statement contains false or misleading information concerning a fact or matter material to the claim is guilty of a Class H felony.

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.

Oklahoma. 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.

Oregon. A person may be committing insurance fraud, if he or she submits an application or claim containing a misstatement, misrepresentation, omission or concealment with intent to defraud (or knowing that he or she is helping to defraud) an insurance company.

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 civil penalties.

Puerto Rico. 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.

Tennessee, Virginia, and Washington. 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.

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.

Vermont. 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.

FOR ALL OTHER STATES. A person may be committing insurance fraud, if he or she submits an application or claim containing a false or deceptive statement with intent to defraud (or knowing that he or she is helping to defraud) an insurance company.