

Claimable Amount Estimation / Pre-Authorization (Cashless) Application Form – Day Surgery

可賠償金額估算 / 預先批核 (免找數) 申請書 – 日間手術

HealthMutual Group Limited (HMG) is a service provider appointed to provide claimable amount estimation and pre-authorization services. For applications relating to Claimable Amount Estimation or Pre-Authorization, please send to sunlife_pa@hmg.com.hk or Fax (852) 3020 6612. For enquiry, please contact Tel (852) 8199 1119.

互康集團被委任為處理可賠償金額估算及預先批核服務之服務商。有關可賠償金額估算或預先批核申請電郵致 sunlife_pa@hmg.com.hk 或 傳真: (852) 3020 6612. 如有查詢, 請致電(852) 8199 1119。



Consultant's Information 顧問資料				
Consultant Name 顧問姓名		District/ Branch Code 區域/分行編號	Consultant Code 顧問編號	Contact Phone No. 聯絡電話
PART I (to be completed by Life Assured / Policyowner / Claimant) 第一部份 (由受保人 / 保單持有人 / 索償人填寫)				
Name of Policyholder 保單持有人姓名	Eng 英文	Family Name 姓 Given Name 名	Chi 中文	Policy No. 保單編號
Name of Insured 受保人姓名	Eng 英文	Family Name 姓 Given Name 名	Chi 中文	
HK Identity Card No. of Insured 受保人香港身份證號碼		Date of Birth 出生日期 YY/MM/DD (年/月/日)		Age 年齡 Sex 性別
Daytime Contact Telephone No. 日間聯絡電話			E-mail Address 電郵地址	
(i) Please describe the signs and symptoms 請描述病徵及症狀				
(ii) Date of the above signs and symptoms first appeared (DD/MM/YY) 首次出現上述病徵及症狀之日期 (日/月/年)				
(iii) Date of first consultation (DD/MM/YY) and Name of the doctor 首次求診日期 (日/月/年) 及醫生姓名				
(iv) Provisional Diagnosis 初步診斷				
☐ If all required information in Part II is fully completed and duly signed by the Physician and the Insured / Policy Owner, please select "Pre-Authorization (Cashless)" to proceed directly. ☐ 如第二部份所有所需資料已完整填寫並由主診醫生及受保人 / 保單主權人正式簽署, 請直接選擇「預先批核(免找數)」, 以繼續處理。				

Personal Information Collection Statement 個人資料收集聲明

I/We understand and consent that, any personal data collected by Sun Life Hong Kong Limited ("Sun Life") (whether collected in this form or otherwise) may be used by Sun Life for the following purposes: (i) processing and evaluating this application and any other applications I/we make; (ii) administering and providing services in relation to this product and any other products I/we hold; (iii) processing and investigating claims; (iv) conducting customer surveys; (v) researching and designing financial, insurance or pensions products for customer use; (vi) selecting and participating in reward, loyalty or privileges program and related service for me/us; (vii) contacting me/us for the above purposes; (viii) complying with all laws, regulations, regulatory guidance, court orders or obligation or requirement under an agreement, or other commitment, between Sun Life or any entity within the Sun Life Group and the regulator or government in any jurisdiction (in relation to money laundering, terrorist financing and tax evasion or otherwise) to which Sun Life and it's related companies are subject to (of Hong Kong or any other countries); and (ix) purposes which are directly related to any of the above purposes.

Sun Life may also use my/our contact details, demographic information and policy details to contact me/us with marketing information regarding Sun Life and third party pensions, financial and insurance products, including by phone calls, mail, email, SMS or any type of electronic message. Sun Life may not so use my/our data unless Sun Life have received my/our consent (which includes an indication of no objection). I/We know I/we can tick the box below if I/we do not consent to receive such marketing information.

Sun Life may disclose my/our personal data for any of the above purposes: (a) to third parties who provide services in Hong Kong or elsewhere which assist Sun Life to carry out the above purposes, including claims investigators, medical advisors, medical service providers, emergency assistance service providers, reinsurers and professional advisors (provided that such contractors are required to keep all such personal data confidential and may only use the personal data to provide those services); (b) to my/our bank for payment purposes; (c) to my/our licensed insurance broker (if any); (d) to Sun Life's licensed insurance agencies and MPF intermediaries; (e) to Sun Life's related companies (as defined in the Companies Ordinance) including pensions services provider, insurance companies and financial services companies; (f) to the Hong Kong Federation of Insurers (or any similar association of insurance companies) and its members; (g) to any person or authority to whom Sun Life and its related companies are required to make disclosure to as a result of applicable law, regulation, regulatory guidance, court order or obligation or requirement under an agreement, or other commitment, between Sun Life or any entity within the Sun Life Group and the regulator or government in any jurisdiction (in relation to money laundering, terrorism and tax evasion or otherwise) that Sun Life and it's related companies are subject to or required to comply with (of Hong Kong or any other countries) and (h) as otherwise required or permitted by law.

Sun Life may also use and disclose my/our personal data in other ways with my/our consent or as otherwise required or permitted by law. I/We understand that the information I/we give is voluntary, but failure to provide the requested personal data may mean Sun Life is unable to process my/our application or continue to provide services to me/us. I/We have the right to seek access to and request correction of any personal data Sun Life holds about me/us by sending a written request to The Manager, Client Service Centre, Sun Life Hong Kong Limited, G/F, MU Tower B, 18 Hung Luen Road, Hunghom, Kowloon, Hong Kong. Sun Life may charge a reasonable fee for the processing of any such requests.

"Sun Life Group" means Sun Life together with its subsidiaries, subsidiary undertakings and associated companies (whether direct or indirect) from time to time.

☐ Please tick here to reject receiving marketing information from Sun Life.

本人 / 吾等明白及同意香港永明金融有限公司(「永明」) 可以將其所收集的任何個人資料(不論由此表格所收集或由其他途徑取得)作以下用途: -(i) 處理及評估本人/吾等的此項申請及任何其他申請; (ii) 管理本人/吾等所持有的本項及其他產品, 並提供相關服務; (iii) 處理及調查索償個案; (iv) 進行客戶調查; (v) 為客戶研究及設計金融、保險或退休金產品; (vi) 為本人/吾等甄選及參與獎賞、忠實或特選客戶計劃; (vii) 因上述目的與本人/吾等聯絡; (viii) 為遵守所有永明及其關連公司所受限制的(香港或其他國家)法例、法規、法規指引、法庭命令或永明或永明集團內的任何實體與任何管轄區域的監管機構或政府之間的協議項下的義務或要求或其他承諾(其相關於洗黑錢、恐怖分子資金籌集、逃稅或其他); 及(ix) 與上述任何目的直接有關的其他目的。

永明亦可使用本人/吾等的聯絡資料、基本個人資料及保單資料、就永明及第三方的退休金、金融及保險產品的推廣資訊, 以包括電話、郵件、電郵、電話短訊或任何電子信息等方法聯絡本人/吾等。除非得到本人/吾等之同意 (包括表示反對), 否則永明不可使用本人/吾等之資料為該用途。本人 / 吾等明白若本人/吾等不同意接受此等推廣資訊, 可於下列方格內填上剔號。

永明可為以上任何目的披露本人/吾等的個人資料予 (a) 為協助永明就上述用途 (不論在香港或其他地方) 而提供服務的第三方, 包括索償調查員、醫療顧問、醫療服務提供者、緊急支援服務供應商、再保險公司、專業顧問(條件是有關辦商須把所有個人資料保密並只會為提供有關服務而使用個人資料); (b)本人/吾等的銀行作繳款用途; (c) 本人/吾等的持牌保險經紀 (如有); (d) 永明的持牌保險代理人及強積金中介人; (e) 永明的關連公司 (根據公司條例訂明) 包括退休金服務提供者、保險公司及金融服務機構 (f) 香港保險業聯會 (或任何相似的保險公司協會) 及其會員; (g) 永明及其關連公司因受(香港或其他國家)之法例、法規、法規指引、法庭命令或永明或永明集團內的任何實體與任何管轄區域的監管機構或政府之間的協議項下的義務或要求或其他承諾(其相關於洗黑錢、恐怖分子資金籌集、逃稅或其他)限制而需向其作出披露的任何人士或監管當局; 及 (h) 按法例要求或准許的其他人士。

永明可就法例准許或於獲得本人/吾等的同意後披露或將本人 / 吾等的個人資料作其他用途。本人/吾等明白本人/吾等所提供之個人資料均屬自願, 然而倘若未能提供所需個人資料, 可導致永明無法處理本人/吾等的申請或繼續提供服務予本人/吾等。本人/吾等有權查閱及要求更正永明持有有關本人/吾等的個人資料, 有關要求可以書面形式郵寄至香港九龍紅磡紅鸞道18號都大中心B座地下香港永明金融有限公司客戶服務中心經理。永明可就處理任何該等要求收取合理費用。

“永明集團”指永明及其不時之附屬公司、附屬企業和相聯公司 (無論是直接的還是間接的)。

☐ 若不同意收取由永明發出的推廣資訊, 請於方格內填上剔號。

Declaration AND Authorization 聲明及授權				
I/WE HEREBY DECLARE AND AGREE that: (a) all the foregoing statements and answers in this claim form together with those in any required medical questionnaire or other document submitted by me/us in connection with this claim are full, complete and true, (b) Sun Life Hong Kong Limited (the "Company") may be unable to process this claim if I/we fail to provide any information related to this claim. I/WE FURTHER AUTHORIZE that: (a) any licensed physician, medical practitioner, hospital, clinic or medically related facility, institution, insurance company, government, private office or person that has any record or knowledge or information of me/ the Insured to disclose, release or transfer to Sun Life Hong Kong Limited or its appointed representatives any such record, knowledge or information. (b) The Company or its appointed medical/paramedical examiner or laboratory for purpose necessary medical assessment and tests to evaluate the health status of me/ the Insured in relation to this application. (c) I specifically authorize the disclosure of all information about communicable diseases and infections, including but not limited to any sexually transmitted disease, HIV infection, Acquired Immune Deficiency Syndrome (A.I.D.S.) and A.I.D.S. related complex (A.R.C.). This authorization shall irrevocably bind the successors and assignees of me/ the Insured and remains valid notwithstanding death or incapacity. A photostatic copy of this authorization shall be as valid as the original.				
本人/吾等聲明及同意下列各點: (甲) 本賠償申請表上所載的聲明及答案, 以及經本人/吾等簽署之所需的醫療問卷或經本人/吾等遞其他文件, 均屬真確無訛, 詳細完整。 (乙) 本人/吾等明白倘有任何未知是否於重要事項的資料均須透露。 (丙) 倘本人/吾等未能提供此申請所需資料, 可導致香港永明金融有限公司 (以下稱為「公司」) 未能處理此賠償申請。		Signature of Insured / Policy Owner (if insured is below age 18) 受保人/保單主權人(如受保人未滿 18 歲)		
本人/吾等同時授權以下各點: (甲) 任何註冊醫生、醫院、診所、保險公司、政府部門或任何其他持有有關本人/受保人之個人資料之人士或機構, 向香港永明金融有限公司或其代表透露, 發放或轉交任何有關資料。 (乙) 公司或公司指定之醫護人員或化驗所, 可就此申請, 對本人/受保人進行所需之醫療評估及測試以審核本人/受保人之健康狀況。 (丙) 本人/吾等特此授權上述人士或機構透露任何關於傳染性疾病及感染的所有資料, 包括但不限於任何經接觸傳染之疾病、人類免疫力缺乏之病毒(HIV) 感染、後天免疫力缺乏之病 (愛滋病)及愛滋病有關發症。此授權對本人/受保人之繼承人或受讓人具有約束力。即使本人/受保人死亡或無行為能力, 此授權書仍有效力。此授權書的影印本與正本具同等效力。		X Date Signed 簽署日期		
Name of Insured / Policy Owner (in block) 受保人保單主權人姓名 (請以正楷大寫)		ID / Passport No. 身份證 / 護照號碼		
Client Service Centre G/F, MU Tower B, 18 Hung Luen Road, Hung Hom, Kowloon Tel (852) 2103 8928 Fax (852) 2103 8938		客戶服務中心 九龍紅磡紅鸞道18號都大中心B座地下 電話 (852) 2103 8928 傳真 (852) 2103 8938		
Sun Life Hong Kong Limited 香港永明金融有限公司 (Incorporated in Bermuda with limited liability 於百慕達註冊成立之有限責任公司)				

Part II 第二部份 - To Be Completed By The Attending Physician / Surgeon 由主診醫生填寫			
Full name of Patient 病人姓名		Identity Card No. 身份證號碼	Age 年齡
Sex 性別			
a. Date of first consultation to you relating to this illness / injury (DD/MM/YY) 病人首次就是次之病症/傷勢向閣下求診日期 (日/月/年)			
b. Signs and Symptoms at the consultation 求診時之病徵及症狀			
c. Date of Signs and Symptoms first appeared according to the patient (DD/MM/YY) 根據病人所述首次病徵及症狀出現之日期 (日/月/年)			
d. Diagnosis 診斷			
e. Underlying Cause 潛在原因			
f. Day Surgical procedure(s) 日間手術程序 and Estimated Surgical Fee			
☐ OGD +/- biopsy +/- polypectomy Estimated Surgical Fee: _____		☐ OGD Estimated Surgical Fee: _____	
☐ Colonoscopy +/- biopsy +/- polypectomy Estimated Surgical Fee: _____		☐ Colonoscopy + banding or injection of haemorrhoids Estimated Surgical Fee: _____	
☐ Phacoemulsification + Intraocular lens implantation Estimated Surgical Fee: _____		☐ Others (Please specify)_ Estimated Surgical Fee: _____	
Mode of anesthesia 麻醉方式:			
☐ IVS		☐ MAC	
☐ LA		☐ Others	
g. Any similar or same medical illness/ symptom related to the current condition in the past? If yes, please provide the dates, diagnosis and the name of consulted doctor(s). 病人以前有否患有同類或類似病況？如「有」，請詳述細節包括：病發日期，診斷名稱及曾求診之醫生名稱。			
Physician's Information 醫生資料			
Signature and Chop of Physician 醫生簽署及蓋印		Physician Name in Block 醫生姓名	
		Date Signed (DD/MM/YY) 簽署日期(日/月/年)	