



# Medical Underwriting Plan

Form 1 — Application and Medical Questionnaire  
(to be completed by the physician)

## Travel Insurance

### Part A CLIENT INFORMATION

Name: \_\_\_\_\_ Date of Birth (d/m/y):     /     /

Address: \_\_\_\_\_

Tel. Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

Travel Dates Departure (d/m/y):     /     /     Return (d/m/y):     /     /     Trip Duration:     days

Exact Destination City: \_\_\_\_\_ State: \_\_\_\_\_ Country: \_\_\_\_\_

### IMPORTANT NOTICE

**Important Notice About Your Personal Information:** By submitting this application you agree that Royal & Sun Alliance Insurance Company of Canada (“we”, “us”) may collect, use and disclose your Personal Information (including to and from your broker, our affiliates and service providers and organizations that may have referred you to us, and professional associations of which you may be a member) for purposes of quoting a premium, policy administration, improving customer experience, administering referral arrangements, and for other lawful purposes described in our Protecting Customer Privacy document. For a copy of this document please see [www.rsatravelinsurance.com](http://www.rsatravelinsurance.com).

### Part B MESSAGE TO THE PHYSICIAN

Filling out this questionnaire\* will assist your patient to obtain the proper emergency medical insurance while he or she is travelling. Proper coverage will safeguard your patient’s financial security.

Although your patient does not qualify for our regular insurance plan, the answers you provide regarding your patient’s health status may enable us to offer a modified travel insurance plan.

Please include any additional relevant information that may help in our assessment. Do not include any results of genetic testing.

If you feel your patient should not be travelling, please discuss this matter with him or her and advise us in Part D - Comments. We appreciate your cooperation.

**\*IMPORTANT: Charges levied for the completion of this document remain your patient’s responsibility.**

### Part C MEDICAL QUESTIONNAIRE (Please type or print clearly)

List all diagnoses and medical and/or surgical conditions	Date of initial presentation	List all current medications	Date of initial prescription	Medication changes (including dosage and date) in the last 12 months	
				Medication	Dates (d/m/y)

1. Has your patient taken **Lasix** or other diuretic in the last 5 years?

yes  no If yes, please provide date & dosage: \_\_\_\_\_

If so, for what condition?  CHF  HTN  Peripheral Edema  Other (please specify): \_\_\_\_\_

2. Does your patient take an **ACE-inhibitor**?

yes  no

If so, for what condition?  CHF  HTN  Other (please specify): \_\_\_\_\_

3. List any other therapy required during the past 3 years (e.g. home oxygen, chemotherapy, radiation therapy, etc.).

Therapy: \_\_\_\_\_ Date or period of treatment (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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Therapy: \_\_\_\_\_ Date or period of treatment (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

4. List all hospitalizations during the past 3 years.

Date of hospitalization (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Diagnosis: \_\_\_\_\_

Date of hospitalization (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Diagnosis: \_\_\_\_\_

Date of hospitalization (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Diagnosis: \_\_\_\_\_

5. List all major tests and investigations during the past 2 years (e.g. cardiac stress test, cardiac catheterization, scans). **Please include a copy of the test results.**

List other recent significant tests (e.g. Hgb for anemia, creatinine for renal insufficiency, LFTs for cirrhosis, etc.).

Test/investigation: \_\_\_\_\_ Date (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Results: \_\_\_\_\_

Test/investigation: \_\_\_\_\_ Date (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Results: \_\_\_\_\_

Test/investigation: \_\_\_\_\_ Date (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Results: \_\_\_\_\_

**Ejection fraction** (if known): \_\_\_\_ % Date (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ **Smoking status:**  yes  no

6. Is the patient awaiting investigations, surgery or any other treatment?

yes  no If so, please specify the **type** and the **date** (d/m/y): \_\_\_\_\_

7. Has your patient ever undergone a **Coronary Artery Bypass Graft**?

yes  no Date (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Angioplasty?**

yes  no Date (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Stenting?**

yes  no Date (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

8. Has the patient ever had a functional **cardiac classification** for **Angina**?

yes  no

If so, what is the patient's **CURRENT class** of Angina?  I  II  III  IV Date of last episode (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

9. Has the patient ever been diagnosed or treated for **Congestive Heart Failure**?

yes  no

If so, what is the patient's **CURRENT class** of Congestive Heart Failure?  I  II  III  IV Date of last episode (d/m/y): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Part D**

**COMMENTS**

**Part E**

**PHYSICIAN INFORMATION**

How long has the applicant been your patient (d/m/y)? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Are you this patient's family physician, specialist or other? \_\_\_\_\_

Physician's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Physician's License Number: \_\_\_\_\_ Tel. Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

**PHYSICIAN'S SIGNATURE:** \_\_\_\_\_ **DATE (d/m/y):** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

THIS FORM MUST BE RETURNED TO: **RSA c/o, Medical Underwriting, 2665 King Ouest, Suite 650, Sherbrooke QC J1L 2G5 / Tel.: 1-877-593-8023 / Fax: 1-855-562-8164**

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