Anthem Senior Advantage (HMO)
Individual Enrollment Request Form — 2014

Anthem BlueCross BlueShield

Be sure to complete the entire enrollment form. Then, **mail** the completed form to **P.O. Box 659403, San Antonio, TX 78265-9714** ***or*** **fax** the completed form to **1-800-833-8554**. You can also enroll online at **www.anthem.com/medicare.** ***Note:*** Your agent/broker may provide different instructions.

Please contact Anthem Blue Cross and Blue Shield if you need information in another language or format (Large Print or Braille).

Please check which plan you want to enroll in.

To add an Optional Supplemental Benefits (OSB) Package, check only one box from the options directly below the medical plan you selected. (TIP: Make sure your OSB and Medical plan selection are in the same column.)

☐ **Anthem Senior Advantage Basic (HMO)** **$0.00 per month**	☐ **Anthem Senior Advantage Plus (HMO)** **$53.00 per month**
☐ **Preventive Dental Package** **$12.00 per month**** ☐ **Dental and Vision Package** **$25.00 per month**** ☐ **Enhanced Dental and Vision Package** **$32.00 per month**** ** This premium is in addition to your monthly plan premium.	

Last name	**First name**	**Middle initial**	☐ **Mr.** ☐ **Mrs.** ☐ **Ms.**

Birthdate (MM/DD/YYYY)	**Sex** ☐ M ☐ F	**Home phone number**	**Alternate phone number**

Permanent residence street address (P.O. Box is not allowed.)

City	State	ZIP code	County

Mailing address (only if different from your permanent residence address)

Street address City State ZIP code

☐ Check here if you are interested in receiving health plan related communications via email in the future. Please provide your email address below, and we will let you know when these become available.

Email address

Applicant Complete: Name _____ and Medicare Claim Number _____

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Please provide your Medicare insurance information

Please take out your red, white and blue Medicare card to complete this section

- Please fill in these blanks so they match your Medicare card.

-OR-

- Attach a copy of your Medicare card or your letter from Social Security or the Railroad Retirement Board.

You must have Medicare Part A and Part B to join a Medicare Advantage plan.

MEDICARE HEALTH INSURANCE

SAMPLE ONLY

Name _____

Medicare Claim Number _____ Sex ____

Is Entitled To — Effective Date

HOSPITAL (Part A) _____

MEDICAL (Part B) _____

Paying your plan premium

You can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail or electronic funds transfer (EFT) each month. You can also choose to pay your premium by automatic deduction from your Social Security or Railroad Retirement Board (RRB) benefit check each month. (Note that direct bills will continue until EFT or SSA/RRB forms have been processed.)

If you are assessed a Part D-Income Related Monthly Adjustment Amount, you will be notified by the Social Security Administration. You will be responsible for paying this extra amount in addition to your plan premium. You will either have the amount withheld from your Social Security benefit check or be billed directly by Medicare or RRB. Do NOT pay Anthem Blue Cross and Blue Shield the Part D-IRMAA.

People with limited incomes may qualify for Extra Help to pay for their prescription drug costs. If eligible, Medicare could pay for 75% or more of your drug costs including monthly prescription drug premiums, annual deductibles and coinsurance. Additionally, those who qualify will not be subject to the coverage gap or a late enrollment penalty. Many people are eligible for these savings and don't even know it. For more information about this Extra Help, contact your local Social Security office, or call Social Security at **1-800-772-1213**. TTY users should call **1-800-325-0778**. You also can apply for Extra Help online at **www.socialsecurity.gov/prescriptionhelp**.

If you qualify for Extra Help with your Medicare prescription drug coverage costs, Medicare will pay all or part of your plan premium. If Medicare pays only a portion of this premium, we will bill you for the amount that Medicare doesn't cover.

If you don't select a payment option, you will get a bill each month.

Please choose one of the options below: (If no option is chosen, you will receive a monthly bill for the amount due.)

☐ **Monthly Bill:** Send me a bill each month

☐ **Automatic Bank Account Deduction:** Electronic funds transfer (EFT) from my bank account each month. (Depending on when you apply, more than one month's amount might be deducted for your ***first*** payment.) Please complete steps 1, 2 and 3 below:

1) Account type: ☐ **Checking:** Must enclose a VOIDED check.
   ☐ **Savings:** Must enclose letter from financial institution with account information.

2) Please complete the following information for your account
   Account holder name _____ Account number _____
   Bank routing number _____ Bank name _____
   (This is the first 9 digits printed on the lower left corner of your check.)

3) ☐ I authorize the bank above to allow this monthly deduction of the amount from the account above.

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☐ **Automatic Social Security or Railroad Retirement Board (RRB) Deduction:** Deduct the amount from my Social Security or Railroad Retirement Board (RRB) benefit check each month. (**After Social Security or RRB approves the automatic deduction, it may take two or more months for the deduction to begin.** In most cases, the first deduction from your Social Security or RRB benefit check will include all premiums due from your enrollment effective date up to the date the automatic deduction begins. If Social Security or RRB delays or does not approve your request for automatic deduction, we will send you a paper bill for your monthly premiums.)

Please read and answer these important questions:

1. **Do you have end-stage renal disease (ESRD)?** ☐ Yes ☐ No

If you have had a successful kidney transplant and/or you don't need regular dialysis any more, please attach a note or records from your doctor showing you have had a successful kidney transplant or you don't need dialysis, otherwise we may need to contact you to obtain additional information.

2. **Some individuals may have other drug coverage, including other private insurance, TRICARE, federal employee health benefits coverage, VA benefits, or state pharmaceutical assistance programs.**

Will your current prescription drug coverage be ending? ☐ Yes ☐ No ☐ N/A

Will you continue to have other prescription drug coverage? ☐ Yes ☐ No ☐ N/A

If "yes," please list your other coverage and your identification (ID) number(s) for this coverage

Dates Covered: Start ___ ___ _____ End ___ ___ _____ Name of other coverage _____

ID number for this coverage _____ Group number for this coverage _____

3. **Are you a resident in a long-term care facility, such as a nursing home?** ☐ Yes ☐ No

If "yes," please provide the following information:

Name of institution _____

Address (number and street) and phone number of institution _____

_____

4. **Are you enrolled in your state Medicaid program?** ☐ Yes ☐ No

If "yes," please provide your Medicaid number _____

5. **Do you or your spouse work?** ☐ Yes ☐ No

6. **Please choose the name of a primary care physician (PCP).**

PCP name _____

PCP address _____

PCP ID number _____

New physician for you? ☐ Yes ☐ No

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Please contact Anthem Blue Cross and Blue Shield at 1-800-467-1199 if you need information in an alternate language or format. Our office hours are 8 a.m. to 8 p.m., 7 days a week from October 1, 2013 to February 14, 2014; Monday-Friday, February 15 to September 30, 2014. TTY users should call 711. Phone help is available for most languages and for reading assistance. This plan also provides some documents in these languages and formats:

Large Print, Braille, Audio Tape, Voice-Enable PDFs.

STOP

Please read this important information.

If you currently have health coverage from an employer or union, joining Anthem Blue Cross and Blue Shield could affect your employer or union health benefits. You could lose your employer or union health coverage if you join Anthem Blue Cross and Blue Shield. Read the communications your employer or union sends you. If you have questions, visit their website, or contact the office listed in their communications. If there isn't any information on whom to contact, your benefits administrator or the office that answers questions about your coverage can help.

Typically, you may enroll in a Medicare Advantage (MA) plan only during the Annual Enrollment Period (AEP) between October 15 and December 7 of each year. Additionally, there are exceptions — i.e., Initial Enrollment Period (ICEP) and Special Enrollment Periods (SEPs) — that may allow you to enroll in a Medicare Advantage plan outside of these periods.

Please read the following statements carefully and check all of the boxes where there is a statement that applies to you. By checking any of the following boxes you are certifying that, to the best of your knowledge, you are eligible for an Enrollment Period. If we later determine that this information is incorrect, you may be disenrolled.

NOTE: You must select at least one of the options below.

- ☐ I am enrolling during the Annual Open Enrollment Period from October 15 to December 7. (AEP)
- ☐ I am new to Medicare. (IEP/ICEP)
- ☐ I am turning 65 and not new to Medicare. (IEP2)
- ☐ I recently moved outside of the service area for my current plan or I recently moved and this plan is a new option for me. I moved on (insert date) _____ . (SEP)
- ☐ I have both Medicare and Medicaid or my state helps pay for my Medicare premiums. (SEP)
- ☐ I get Extra Help paying for Medicare prescription drug coverage. (SEP)
- ☐ I no longer qualify for Extra Help paying for my Medicare prescription drugs. I stopped receiving Extra Help on (insert date) _____ . (SEP)
- ☐ I am moving into, live in or recently moved out of a long-term care facility (for example, a nursing home or long-term care facility). I moved/will move into/out of the facility on (insert date) _____ . (SEP)
- ☐ I recently left a Program of All-inclusive Care for the Elderly (PACE®) program on (insert date) _____ . (SEP)
- ☐ I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on (insert date) _____ . (SEP)
- ☐ I am leaving employer or union coverage on (insert date) _____ . (SEP)
- ☐ I belong to a pharmacy assistance program provided by my state. (SEP)
- ☐ I recently returned to the United States after living permanently outside of the U.S. I returned to the U.S. on (insert date) _____ . (SEP)
- ☐ My plan is ending its contract with Medicare or Medicare is ending its contract with my plan. (SEP)

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☐ I was enrolled in a Special Needs Plan (SNP) but I have lost the special needs qualification required to be in that plan. I was disenrolled from the SNP on (insert date) _____ .

☐ Other* _____

*Please contact Anthem Blue Cross and Blue Shield at **1-800-467-1199** (TTY users should call **711**) to see if you are eligible to enroll.

Please read and sign below.

By completing this enrollment application, I agree to the following:

Anthem Senior Advantage (HMO) is a Medicare Advantage plan and has a contract with the federal government. I will need to keep my Medicare Parts A and B. I can be in only one Medicare Advantage plan at a time, and I understand that my enrollment in this plan automatically will end my enrollment in another Medicare health plan or prescription drug plan. It is my responsibility to inform you of any prescription drug coverage that I have or may get in the future. I will read the Evidence of Coverage document from Anthem Blue Cross and Blue Shield when I get it to know what I must follow to maintain coverage. I understand that if I have had a prior break in creditable prescription drug coverage (as good as Medicare's), or leave this plan and don't have or get other Medicare prescription drug coverage or creditable prescription coverage (as good as Medicare's), I may have to pay a late enrollment penalty in addition to my premium for Medicare prescription drug coverage. Enrollment in this plan is generally for the entire year. Once I enroll, I may leave this plan or make changes only at certain times of the year when an enrollment period is available (for example, October 15 – December 7 of every year), or under certain special circumstances.

Anthem Senior Advantage (HMO) serves a specific service area. If I move out of the area that Anthem Blue Cross and Blue Shield serves, I need to notify the plan so I can disenroll and find a new plan in my new area. Once I am a member of Anthem Senior Advantage (HMO), I have the right to appeal plan decisions about payment or services if I disagree. I will read the Evidence of Coverage document from Anthem Blue Cross and Blue Shield when I get it to know which rules I must follow to get coverage with this Medicare Advantage plan. I understand that people with Medicare usually aren't covered under Medicare while out of the country except for limited coverage near the U.S. border.

I understand that beginning on the date Anthem Blue Cross and Blue Shield coverage begins, I must get all of my health care from Anthem Blue Cross and Blue Shield, except for emergency or urgently needed services or out-of-area dialysis services. Services authorized by Anthem Blue Cross and Blue Shield and other services contained in my Anthem Senior Advantage (HMO) Evidence of Coverage document (also known as a member contract or subscriber agreement) will be covered. Without authorization, **NEITHER MEDICARE NOR ANTHEM BLUE CROSS AND BLUE SHIELD WILL PAY FOR THE SERVICES**.

I understand that if I am getting assistance from a sales agent, broker, or other individual employed by or contracted with Anthem Blue Cross and Blue Shield, he/she may be paid based on my enrollment in Anthem Senior Advantage (HMO).

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Release of Information: By joining this Medicare health plan, I acknowledge that Anthem Blue Cross and Blue Shield will release my information to Medicare and other plans as is necessary for treatment, payment and health care operations. I also acknowledge that Anthem Blue Cross and Blue Shield will release my information including my prescription drug event data to Medicare, who may release it for research and other purposes which follow all applicable federal statutes and regulations. The information on this enrollment form is correct to the best of my knowledge. I understand that if I intentionally provide false information on this form, I will be disenrolled from the plan.

I understand that my signature (or the signature of the person authorized to act on my behalf under the laws of the state where I live) on this application means that I have read and understand the contents of this application. If signed by an authorized individual (as described above), this signature certifies that 1) this person is authorized under state law to complete this enrollment and 2) documentation of this authority is available upon request from Medicare.

Signature Required to process your application.

Applicant signature	**Today's date**
Desired plan effective date:	

Authorized Representative Information Only

All fields within this section must be completed if the application has been signed by an Authorized Representative and not the Applicant.

Name _____

Address _____

_____

Phone number _____ - _____ - _____

Relationship to enrollee _____

Applicant: Please do not complete the following sections.
***Agent/Broker: Please complete the following section carefully*.**

Coverage effective date _____

☐IEP/ICEP ☐AEP ☐SEP (type): _____ ☐Not eligible

PLAN ID #: _____

1. Was this an individual face-to-face appointment? ☐ Yes ☐ No (If No, do not proceed.)
2. If this was an individual face-to-face appointment, how was a scope of appointment (SOA) collected?
   ☐ Paper ☐ Recorded call (voice vault confirmation number _____)
3. Was the SOA signed on the same day as the appointment? ☐ Yes ☐ No (If No, do not proceed.)
4. If yes, please indicate the best reason below:

☐ Appointment was requested at the end of the month for the following month enrollment

☐ Customer walk-in

☐ Request for individual appointment immediately following a seminar sales event

☐ Next-day appointment

☐ Other _____

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***Direct sales reps only*:** Complete if you assisted in enrollment.

Print name _____

Tax identification number (10 digits) or agent code (variable) ___ ___ ___ ___ ___ ___ ___ ___ ___ ___

Signature _____ Application received date _____

External agents/brokers only:

application received _____

I helped the applicant fill out this application

☐ Yes ☐ No

REQUIRED/MANDATORY: Please fill in BOTH required fields - 'Writing Agent' and 'Agency' with your assigned Code, Tax ID, or Encryption based on your appointed brand, state AND product.

Writing Agent TIN/Agent Code

G 1 9 7 6 ___ ___ ___ ___ ___

Agency TIN/Agency Code (NOTE: If you are directly appointed, populate your writing information again.)

G 1 9 7 6 ___ ___ ___ ___ ___

Please complete all lines below.

Agent/broker's printed name

Rick Plata

Agency name _____

Street address

City State ZIP code

Phone number 888 - 235 - 8060

Fax number 888 - 391 - 0562

Email address

advisorrick@msn.com

External agent/broker's

Signature _____

Anthem Blue Cross and Blue Shield is an HMO plan with a Medicare contract. Enrollment in Anthem Blue Cross and Blue Shield depends on contract renewal.

Anthem Blue Cross and Blue Shield is the trade name of Community Insurance Company. Independent licensee of the Blue Cross and Blue Shield Association. ®ANTHEM is a registered trademark of Anthem Insurance Companies, Inc. The Blue Cross and Blue Shield names and symbols are registered marks of the Blue Cross and Blue Shield Association.

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Please mail your completed form to:

Medicare Options

Attention: Rick Plata
23331 Via Sausalito
Moreno Valley, CA 92557

Or

Fax to: (888) 391- 0562

Enrollment questions, please call Rick Plata at (888) 235-8060.