

# Blue Medicare Access (Regional PPO)

## Individual Enrollment Request Form – 2012



**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).

|  |  |                             |   |
|--|--|-----------------------------|---|
| <b>To enroll in Blue Medicare Access (Regional PPO), please provide the following information.</b> |  |                             |   |
| <b>Please check which plan you want to enroll in:</b>  |  |                             |   |
| <input type="checkbox"/> <b>Blue Medicare Access Value (Regional PPO)</b><br>\$0.00 per month      |  |                             |   |
| Last name  | First name   | Middle initial              | <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. |
| Birth date ( ___/___/____ )<br>(MM / DD / YYYY)  | Sex<br><input type="checkbox"/> M <input type="checkbox"/> F | Home phone number<br>(    ) | Alternate phone number<br>(    )  |
| Permanent residence street address (P.O. Box is not allowed.)                                      |  |                             |   |
| City   | State  | ZIP code                    | County  |
| <b>Mailing address</b> (only if different from your permanent residence address)                   |  |                             |   |
| Street address   | City   | State                       | ZIP code  |
| <b>Email address</b>   |  |                             |   |

|   |  |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
|---|--|------------------|--|------------------|--------------------|--|--|------------|--|--|-----------------------------|-----------|--|-----------------------|--|--|----------------|----------------|--|--------------------------|-------|--|-------------------------|-------|--|
| <b>Please provide your Medicare insurance information.</b>  |  |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
| <p>Please take out your red, white and blue Medicare card to complete this section.</p> <ul style="list-style-type: none"> <li>· Please fill in these blanks so they match your Medicare card.</li> <li>- OR -</li> <li>· Attach a copy of your Medicare card or your letter from Social Security or the Railroad Retirement Board.</li> </ul> <p>You must have Medicare Part A and Part B to join a Medicare Advantage plan.</p> | <table border="1" style="width:100%; border-collapse: collapse;"> <tr style="background-color: #e0e0e0;"> <td style="text-align: center;">MEDICARE</td> <td style="text-align: center;"></td> <td style="text-align: center;">HEALTH INSURANCE</td> </tr> <tr style="background-color: #e0e0e0;"> <td colspan="3" style="text-align: center;"><i>SAMPLE ONLY</i></td> </tr> <tr> <td>Name _____</td> <td colspan="2"></td> </tr> <tr> <td>Medicare Claim Number _____</td> <td>Sex _____</td> <td></td> </tr> <tr> <td>_____ - _____ - _____</td> <td colspan="2"></td> </tr> <tr> <td>Is Entitled To</td> <td colspan="2">Effective Date</td> </tr> <tr> <td><b>HOSPITAL (Part A)</b></td> <td colspan="2">_____</td> </tr> <tr> <td><b>MEDICAL (Part B)</b></td> <td colspan="2">_____</td> </tr> </table> | MEDICARE         |  | HEALTH INSURANCE | <i>SAMPLE ONLY</i> |  |  | Name _____ |  |  | Medicare Claim Number _____ | Sex _____ |  | _____ - _____ - _____ |  |  | Is Entitled To | Effective Date |  | <b>HOSPITAL (Part A)</b> | _____ |  | <b>MEDICAL (Part B)</b> | _____ |  |
| MEDICARE  |  | HEALTH INSURANCE |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
| <i>SAMPLE ONLY</i>  |  |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
| Name _____  |  |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
| Medicare Claim Number _____   | Sex _____  |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
| _____ - _____ - _____   |  |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
| Is Entitled To  | Effective Date   |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
| <b>HOSPITAL (Part A)</b>  | _____  |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |
| <b>MEDICAL (Part B)</b>   | _____  |                  |  |                  |                    |  |  |            |  |  |                             |           |  |                       |  |  |                |                |  |                          |       |  |                         |       |  |

**Applicant Complete:** Name \_\_\_\_\_ and Medicare ID number \_\_\_\_\_

**Paying your plan premium**

If we determine that you owe a late enrollment penalty (or if you currently have a late enrollment penalty), we need to know how you would prefer to pay it. You can pay by mail or electronic funds transfer (EFT) each month. You also can choose to pay your premium by automatic deduction from your Social Security or Railroad Retirement Board (RRB) benefit check each month.

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](http://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.

**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. (The Social Security/RRB deduction may take two or more months to begin after Social Security or RRB approves the deduction. In most cases, if Social Security or RRB accepts your request for automatic deduction, 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 withholding begins. If Social Security or RRB 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 anymore, 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 you have other prescription drug coverage in addition to your Blue Medicare Access (Regional PPO)?**

Yes  No

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

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

**Please check one of the boxes below if you would prefer that we send you information in another format:**

\_\_\_\_\_ Large Print    \_\_\_\_\_ Braille

Please contact an Anthem Blue Cross and Blue Shield Customer Service agent at **1-800-467-1199** if you need information in another language or format than what is listed above. Our office hours are 8 a.m. to 8 p.m., 7 days a week. TTY users should call **1-888-853-7754**.

# STOP

Please read this important information.

If you currently have health coverage from an employer or union, joining Blue Medicare Access (Regional PPO) could affect your employer or union health benefits. You could lose your employer or union health coverage if you join Blue Medicare Access (Regional PPO). 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. (ICEP)
- 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)
- None of these statements applies to me.\*

\*Please contact an Anthem Blue Cross and Blue Shield licensed insurance agent at **1-866-803-5169** (TTY users should call **1-800-241-6894**) to see if you are eligible to enroll. We are open 8 a.m. to 8 p.m., 7 days a week.

Page 4 of 7

**Applicant Complete:** Name \_\_\_\_\_ and Medicare ID number \_\_\_\_\_

Y0071\_12\_12311\_R\_022 CMS Approved 08/12/2011

21011MUSENMUB\_022  
R5941 008 OH Regional PPO

White - agent copy; Yellow - member copy

**Please read and sign below.**

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

Blue Medicare Access (Regional PPO) 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 understand that if I don't have Medicare prescription drug coverage, or creditable prescription drug coverage (as good as Medicare's), I may have to pay a late enrollment penalty if I enroll in Medicare prescription drug coverage in the future. 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.

Blue Medicare Access (Regional PPO) 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 Blue Medicare Access (Regional PPO), 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 Blue Medicare Access (Regional PPO) coverage begins, using services in-network can cost less than using services out-of-network, except for emergency or urgently needed services or out-of-area dialysis services. If medically necessary, Anthem Blue Cross and Blue Shield provides refunds for all covered benefits, even if I get services out of network. Services authorized by Anthem Blue Cross and Blue Shield and other services contained in my Blue Medicare Access (Regional PPO) 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 Blue Medicare Access (Regional PPO).

**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.

|  |                     |
|--|---------------------|
| <b>Signature</b>   | <b>Today's date</b> |
| <b>Desired plan effective date:</b>  |                     |
| If you are the authorized representative, you must sign above and provide the following information: |                     |
| <b>Name</b> _____  |                     |
| <b>Address</b> _____<br>_____  |                     |
| <b>Phone number</b> ( ____ ) _____ - _____   |                     |
| Relationship to enrollee _____   |                     |

**Applicant: Please do not complete the following sections. For office and agent/broker use only.**

**Internal agents or external agents/brokers, please complete:** Coverage effective date \_\_\_/\_\_\_/\_\_\_

ICEP/IEP  AEP  SEP (type): \_\_\_\_\_  Not eligible

PLAN ID #: \_\_\_\_\_ NIPR #: \_\_\_\_\_

1. Was this an individual face-to-face appointment?  Yes  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 (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 \_\_\_\_\_

**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 \_\_\_\_\_

This plan is an RPPO with a Medicare contract. Anthem Insurance Companies, Inc. (AICI) is the legal entity that has contracted with the Centers for Medicare and Medicaid Services (CMS) to offer the Medicare Advantage Regional PPO plan(s) (MAPD-RPPO) noted above or herein. AICI is the risk-bearing entity licensed under applicable state law to offer the MAPD-RPPO plan(s) noted. AICI has retained the services of its related companies and the authorized agents/brokers/producers to provide administrative services and/or to make the MAPD-RPPO plan(s) available in this region. Anthem Blue Cross and Blue Shield is the trade name of Community Insurance Company, independent licensees 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.

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.