

2019 Individual Enrollment Request Form
Blue Shield 65 Plus (HMO), Blue Shield 65 Plus Choice Plan (HMO)
and Blue Shield Trio Medicare (HMO)



Please contact Blue Shield of California if you need information in another language or format (large print).

Please fax or mail your completed enrollment form to:

Fax: (877) 251-3660

Mail: Blue Shield of California,
 PO Box 948, Woodland Hills, CA 91365-9856

To enroll in Blue Shield 65 PlusSM, Blue Shield 65 PlusSM Choice Plan or Blue Shield Trio Medicare, please provide the following information:

Please check which plan you want to enroll in, based on where you live:

- Blue Shield 65 Plus – Los Angeles*/Orange Counties (\$0 per month)
- Blue Shield 65 Plus Choice Plan – Los Angeles*/Orange Counties (\$0 per month)
- Blue Shield 65 Plus Choice Plan – San Bernardino*/Riverside* Counties (\$0 per month)
- Blue Shield 65 Plus – Fresno County (\$20 per month)
- Blue Shield 65 Plus – Kern County* (\$0 per month)
- Blue Shield 65 Plus – Riverside* County (\$0 per month)
- Blue Shield Trio Medicare – Sacramento* County (\$39 per month)
- Blue Shield 65 Plus – San Bernardino* County (\$0 per month)
- Blue Shield 65 Plus – Santa Barbara*/San Luis Obispo* Counties (\$0 per month)
- Blue Shield 65 Plus – San Diego County (\$0 per month)
- Blue Shield 65 Plus – Ventura* County (\$29 per month)

* See the Summary of Benefits for covered ZIP codes.

Please indicate if you would like to enroll in the Optional Supplemental Dental HMO or PPO plan

- Optional Supplemental Dental HMO plan (\$12.40 per month)
 (not available in Santa Barbara/San Luis Obispo counties)

Name of dentist _____ Provider ID# _____

If you do not select a dentist, you will be assigned a dentist at the time of enrollment.

- Optional Supplemental Dental PPO plan (\$34.90 per month)
 No dentist selection necessary for the PPO plan.

Last name	First name	Middle initial	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.
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Birth date (____/____/____) MM/DD/YYYY	Sex <input type="checkbox"/> M <input type="checkbox"/> F	Home phone number
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Permanent residence street address (P.O. Box is not allowed)

Street	City	State	ZIP code
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Mailing address (only if different from your Permanent Residence Address)

Street	City	State	ZIP code
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Email address

- I am willing to receive required plan materials via email (i.e. enrollment notifications and Annual Notice of Changes) in place of mailed printed copies.
- I am willing to receive non-required plan materials via email (i.e., benefit promotions, and event invitations, and plan newsletter) in place of mailed printed copies.

Not checking the boxes above means you will receive printed plan materials via the mail. You may choose to go back to printed materials at any time by calling Member Services at the number on your plan ID card.

Please Provide Your Medicare Insurance Information

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

- Fill out this information as it appears on your Medicare card.
- OR-
- Attach a copy of your Medicare card or your letter from Social Security or the Railroad Retirement Board.

Name (as it appears on your Medicare card):

Medicare Number:

Is Entitled To: Effective Date:

HOSPITAL (Part A) _____

MEDICAL (Part B) _____

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

Paying your plan premium

You can pay your monthly plan premium, if you have one, (including any late enrollment penalty that you currently have or may owe, and the optional supplemental dental HMO or PPO plan premium, if you enrolled in that plan) by mail or by "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.

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 the RRB. **DO NOT** pay Blue Shield of California 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 co-insurance. 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 can also 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 select a premium payment option:

- Get a monthly bill.
- Electronic funds transfer (EFT) from your bank account each month. Please enclose a VOIDED check or provide the following:
- Account holder name: _____
- Bank routing number: _____
- Bank account number: _____
- Account type: Checking Saving
- Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check.

I get monthly benefits from: Social Security RRB

(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 point 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 Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, or Blue Shield Trio Medicare? Yes No

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

Prescription drug coverage

Name of other coverage

ID # for this coverage

Group #

Medical coverage

Name of other coverage

ID # for this coverage

Group #

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 and phone number of institution (number and street)

4. Are you enrolled in your State Medicaid program (Medi-Cal)? Yes No

If "yes," please provide your Medicaid (Medi-Cal) number

5. Do you or your spouse work? Yes No

Choose a primary care physician and physician group

Physician name

Physician ID No.

Current patient Yes No

Physician group name

Please check one of the boxes below if you would prefer us to send you information in a language other than English or in an accessible format: Spanish Large print

Please contact Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, or Blue Shield Trio Medicare at **(800) 776-4466** [TTY users should call **711**] if you need information in an accessible format or language other than what is listed above. Our office hours are 8 a.m. to 8 p.m., seven days a week, from October 1 through March 31, and 8 a.m. to 8 p.m., weekdays (8 a.m. to 5 p.m., Saturday and Sunday), from April 1 through September 30.



Please read this important information

If you currently have health coverage from an employer or union, joining Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, or Blue Shield Trio Medicare could affect your employer or union health benefits. You could lose your employer or union health coverage if you join Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan or Blue Shield Trio Medicare. 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.

Please read and sign below

By completing this enrollment application, I agree to the following: Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, and Blue Shield Trio Medicare are Medicare Advantage plans and have a contract with the Federal government. I will need to keep my Medicare Parts A and B. I can only be in one Medicare Advantage plan at a time, and I understand that my enrollment in this plan will automatically 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. 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 (Example: October 15 – December 7 of every year), or under certain special circumstances.

Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, and Blue Shield Trio Medicare serve specific service areas. If I move out of the area that Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, and Blue Shield Trio Medicare serve, 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 Shield 65 Plus, Blue Shield 65 Plus Choice Plan, and Blue Shield Trio Medicare, I have the right to appeal plan decisions about payment or services if I disagree. I will read the *Evidence of Coverage* document from 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 aren't usually 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 Shield 65 Plus, Blue Shield 65 Plus Choice Plan, or Blue Shield Trio Medicare coverage begins, I must get all of my health care from Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, and Blue Shield Trio Medicare, except for emergency or urgently needed services or out-of-area dialysis services. Services authorized by Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, or Blue Shield Trio Medicare and other services contained in my Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, and Blue Shield Trio Medicare Evidence of Coverage document (also known as a member contract or subscriber agreement) will be covered. Without authorization, **NEITHER MEDICARE NOR Blue Shield 65 PLUS, Blue Shield 65 PLUS CHOICE PLAN, OR Blue Shield TRIO MEDICARE 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 Blue Shield of California, he/she may be paid based on my enrollment in Blue Shield 65 Plus, Blue Shield 65 Plus Choice Plan, or Blue Shield Trio Medicare.

Release of information: By joining this Medicare health plan, I acknowledge that Blue Shield of California will release my information to Medicare and other plans as is necessary for treatment, payment and health care operations. I also acknowledge that Blue Shield of California 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

Today's date

If you are the legally authorized representative (i.e., power of attorney or legal guardian – see description above), you must sign above and provide the following information:

Name

Address

Phone number

Relationship to enrollee

Producer information: Producer name and ID or NPN is required

TMO/GMO/Agency name Applied General Agency

(please print appointed agency name)

TMO/GMO/Agency ID No. 330961867E

(please print agency ID)

Producer name

(please print writing agent name)

Producer ID No. Agent NPN

(please print agent ID number or NPN)

Producer phone number

Producer email address

Date application received by producer

Producer signature

With my signature, I hereby certify that I have read and understand the CMS Medicare Communications and Marketing Guidelines and Enrollment rules and confirm that the enrollee has received a complete enrollment kit. I agree that this enrollment of a Medicare beneficiary, on behalf of Blue Shield of California, has complied with these rules.

Typically, you may enroll in a Medicare Advantage plan only during the annual enrollment period from October 15 through December 7 of each year. There are exceptions that may allow you to enroll in a Medicare Advantage plan outside of this period.

Please read the following statements carefully and check the box if the statement 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.

- I am new to Medicare.
- I am enrolled in a Medicare Advantage plan and want to make a change during the Medicare Advantage Open Enrollment Period (MA OEP).
- 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) _____.
- I recently was released from incarceration. I was released on (insert date) _____.
- I recently returned to the United States after living permanently outside of the U.S. I returned to the U.S. on (insert date) _____.
- I recently obtained lawful presences status in the United States. I got this status on (insert date) _____.
- I recently had a change in my Medicaid (newly got Medicaid, had a change in level of Medicaid assistance, or lost Medicaid) on (insert date) _____.
- I recently had a change in my Extra Help paying for Medicare prescription drug coverage (newly got Extra Help, had a change in the level of Extra Help, or lost Extra Help) on (insert date) _____.
- I have both Medicare and Medicaid (or my state helps pay for my Medicare premiums) or I get Extra Help paying for my Medicare prescription drug coverage, but I haven't had a change.
- 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) _____.
- I recently left a PACE program on (insert date) _____.
- I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on (insert date) _____.
- I am leaving employer or union coverage on (insert date) _____.
- I belong to a pharmacy assistance program provided by my state.
- My plan is ending its contract with Medicare, or Medicare is ending its contract with my plan.
- I was enrolled in a plan by Medicare (or my state) and I want to choose a different plan. My enrollment in that plan started on (insert date) _____.
- I was enrolled in a Special Needs Plan (SNP) but I have lost the special needs qualifications required to be in the plan. I was disenrolled from the SNP on (insert date) _____.
- I was affected by a weather-related emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA)). One of the other statements here applied to me, but I was unable to make my enrollment because of the natural disaster.

If none of these statements applies to you or you're not sure, please contact Blue Shield Member Services at (800) 776-4466 (TTY users should call 711) to see if you are eligible to enroll. We are open 8 a.m. to 8 p.m., seven days a week, from October 1 through March 31, and 8 a.m. to 8 p.m., weekdays (8 a.m. to 5 p.m., Saturday and Sunday), from April 1 through September 30.

Office use only:

Name of staff member (if assisted in enrollment) _____
(Please print name)

Plan ID No. _____ Effective date of coverage _____ ICEP/IEP _____
AEP _____ SEP (type) _____ Not eligible _____ NIPR No. _____

Scope of Sales Appointment Confirmation Form

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or his or her authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his or her authorized representative.

In the boxes below, please put your initials beside the plan type that you want the agent to discuss with you. If you do not want the agent to discuss a plan type with you, please leave the box empty. (Please note that an agent may also discuss Medicare Supplement plans with you.)

Stand-alone Medicare Prescription Drug Plans (Part D) (PDP) – Stand-alone drug plans that add prescription drug coverage to Original Medicare, some Medicare Cost Plans, some Medicare Private Fee-for-Service Plans, and Medicare Medical Savings Account Plans.

Medicare Advantage Plans (Part C) (HMO) – A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you receive care only from doctors or hospitals in the plan's network (except in emergencies). May include optional supplemental dental HMO and PPO plan information.

Dental HMO, Dental PPO or Dental + Vision plans – Stand-alone plans that provide dental and vision coverage. Medicare has neither reviewed, nor endorses, these plans.

By signing this form:

- you agree to a sales meeting with a sales agent to discuss the types of products you initialed above.
- you agree to have a Blue Shield of California sales agent contact you to discuss the specific types of products you initialed above.

Please note, the person who will discuss the plan options is either employed by Blue Shield of California or contracted by a Medicare plan. They do not work directly for the Federal government. The individual may also be paid based on your enrollment in a plan.

Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

Beneficiary or authorized representative signature and signature date:

Signature: _____

Signature Date: _____

If you are the authorized representative, please sign above and print below:

Representative's name: _____

Address (optional): _____

Phone number (optional): _____

Your relationship to the beneficiary: _____

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blueshieldca.com



To be completed by Agent:

Beneficiary name: _____

Date of birth (optional): _____

Beneficiary phone: _____

Beneficiary address: _____

Beneficiary e-mail (optional): _____

To be completed by agent at sales event:

Event type: _____ Event date: _____

Event location: _____

Presenter: _____

Initial method of contact: (Indicate here if beneficiary was a walk-in)

Plan(s) the agent represented during this event/meeting:

Date appointment completed: _____

If this Scope of Sales Appointment form is signed by the beneficiary at time of appointment, provide explanation why it was not documented prior to meeting:

Agent name: _____

Agent phone: _____

Agent signature: _____

Date: _____ **Time:** _____

Plan use only

Send completed form by:

Mail to: Blue Shield of California, Medicare Installation and Membership, P.O. Box 948, Woodland Hills, CA 91365

Fax to: Blue Shield of California, Medicare Installation and Membership, **(877) 251-3660**

Agent, for additional information, call Blue Shield Producer Services at **(800) 559-5905** or your regional sales manager.

* Scope of Appointment documentation is subject to CMS record retention requirements.*

Blue Shield of California is an HMO and PDP plan with a Medicare contract. Enrollment in Blue Shield of California depends on contract renewal.

Attention: If you speak language other than English, language assistance services, free of charge, are available to you. Call **(800) 776-4466** (TTY: 711).