Application for
Blue Shield of California Medicare Supplement plans

blue of california

FOR OFFICE USE ONLY
Accept. code _____ Plan type _____ Market code _____

Here's how to apply

1. Provide ALL requested information and print clearly in blue or black ink.
2. Sign and date in all places indicated.
3. Within 30 days of your signature date, mail the application in the enclosed postage-paid envelope. Keep the yellow copy for your records.
4. Please submit your first payment along with your application. Blue Shield will refund your payment if your application is not approved.

If you have questions about how to enroll, please call us at **(888) 713-0000** or TTY/TDD (888) 595-0000.

Personal information

First name	Middle initial	Last name	
Home address			
City		State	ZIP
Home telephone ( )		E-mail address	
Mailing address (if different from above)			
City		State	ZIP
Billing address (if different from above)			
City		State	ZIP
Gender: ☐ Male ☐ Female		Date of birth ___ ___ – ___ ___ – ___ ___ ___ ___ Month Day Year	
Medicare number		Social Security number	

I'm entitled to: ☐ Hospital (Part A) effective date _____
☐ Medical (Part B) effective date _____

Please check the plan type you are applying for: ☐ A ☐ B ☐ C ☐ D ☐ F ☐ G ☐ J ☐ K

Requested effective date: The ☐ 1st day or ☐ 15th day of ___ ___ – ___ ___ ___ ___
Month Year

Language preference ☐ English ☐ Spanish ☐ Mandarin ☐ Other _____

Medicare prescription drug plan information

Have you purchased a Medicare prescription drug plan? ☐ Yes ☐ No

If Yes,

a. With what company? _____ b. What is the effective date? _____

Guaranteed acceptance

If you think you qualify for guaranteed acceptance, please write the number of the qualifying situation, as described in the enclosed Blue Shield Guaranteed Acceptance Guide, in the space below. Then attach proof of prior coverage as a separate sheet, and sign and date the sheet.

I believe I qualify for guaranteed acceptance based on situation number_____ **.**

If applying for guaranteed acceptance under situation No. 2 on the enclosed Blue Shield Guaranteed Acceptance Guide, please complete the Notice of Replacement of Coverage form and submit with your completed enrollment application.

Two-party contracts:

You and your spouse or domestic partner may qualify for a TWO-PARTY CONTRACT. Both individuals must be age 65 or older, enrolled in both Medicare Parts A and B, and apply for the same plan type. Either person who does not qualify for guaranteed acceptance (see above) will be subject to underwriting.

1. If you and your spouse/domestic partner are applying for a two-party contract, please check this box: ☐

2. Is your spouse/domestic partner currently enrolled in a Blue Shield Medicare Supplement plan? ☐ Yes ☐ No

   a. If YES which plan type?_____

      Please provide

      1. Your spouse/domestic partner's name: _____

      2. Spouse/domestic partner's Social Security number: _____

      3. Spouse/domestic partner's authorization to change their contract to a two-party contract by signing below:

         Spouse/domestic partner signature:_____ Date:_____

         Print name_____

   b. If NO, and you are both currently applying for coverage, you and your spouse/domestic partner must each complete your own application. On each application, please provide your spouse/domestic partner's name and social security number.

Payment information

Please include your first payment along with your application. To determine the monthly dues amount, refer to Blue Shield's Medicare Supplement plans Summary of Benefits and Provisions. If you are not approved, Blue Shield will refund your payment amount. If your application is approved, you will receive a bill indicating the amount and the date your next payment is due. Blue Shield will also send you an approval letter, *Evidence of Coverage and Health Service Agreement*, and member identification card as proof of approval.

Select your payment choice:

- ☐ Easy$Pay℠ (automatic monthly debit – you must complete the enclosed Automatic Payment form)
- ☐ Credit card payment (automatic monthly or quarterly charge – you must complete the enclosed Automatic Payment form)
  - ☐ Quarterly billing ☐ Monthly billing
- ☐ I already participate in Blue Shield's Automatic Payment, and would like to continue my authorization for automatic charge/debit of dues for the rate applicable to the plan identified above, if my application is approved.

Please enclose only one check for the applicable two-party rate, which can be found in the Summary of Benefits.

- ☐ Check enclosed with this application
- ☐ Check enclosed with spouse/domestic partner's application

Current health plan information

If you lost or are losing other health insurance coverage and received a notice from your prior insurer saying you were eligible for guaranteed issue of a Medicare Supplement insurance contract, or that you had certain rights to buy such a contract, you may be guaranteed acceptance in one or more of our Medicare Supplement plans. The Blue Shield Guaranteed Acceptance Guide describes the different situations in which you may be eligible for guaranteed issue of a Medicare Supplement plan. It is important to note that the time period of eligibility for guaranteed issuance may vary by situation, and you must apply within this time period to be eligible for guaranteed acceptance. Please include a copy of the notice from your prior insurer with your application.

Please answer all questions. (Please mark Yes or No below with an X.) To the best of your knowledge,

1 ☐ Yes ☐ No a. Did you turn 65 years of age in the last 6 months?

☐ Yes ☐ No b. Did you enroll in Medicare Part B in the last 6 months?

c. If yes, what is the effective date? _____

2 ☐ Yes ☐ No Are you covered for medical assistance through California's Medi-Cal program?
NOTE TO APPLICANT: If you have a share of cost under the Medi-Cal program, please answer NO to this question.

If Yes,

☐ Yes ☐ No a. Will Medi-Cal pay your premiums for this Medicare Supplement plan contract?

☐ Yes ☐ No b. Do you receive benefits from Medi-Cal OTHER THAN payments toward your Medicare Part B premium?

3 ☐ Yes ☐ No If you had coverage from any Medicare plan other than original Medicare within the past 63 days (for example, a Medicare Advantage plan or a Medicare HMO or PPO), fill in your start and end dates below. If you are still covered under this plan, leave the "END" blank.

Start ____ /____ /____ End ____ /____ /____

Carrier name: _____ Carrier phone No.: _____

Member No.: _____

If Yes,

☐ Yes ☐ No a. If you are still covered under the Medicare plan, do you intend to replace your current coverage with this new Medicare Supplement plan contract?

☐ Yes ☐ No b. Was this your first time in this type of Medicare plan?

☐ Yes ☐ No c. Did you drop a Medicare Supplement plan contract to enroll in the Medicare plan?

4 ☐ Yes ☐ No Do you have another Medicare Supplement plan policy or certificate or contract in force?

a. If so, with what company? _____ What plan do you have? _____

☐ Yes ☐ No b. If so, do you intend to replace your current Medicare Supplement plan policy or certificate with this contract?

5 ☐ Yes ☐ No Have you had coverage under any other health insurance within the past 63 days (for example, an employer, union, or individual plan)? If so, what companies and what kind of policy?

Carrier name: _____ Carrier phone No.: _____

Current ID No.: _____

What are your dates of coverage under the other policy? (If you are still covered under the other policy, leave the "END" blank.) Start ____ /____ /____ End ____ /____ /____

6 ☐ Yes ☐ No Are you under age 65?

If Yes, a. Do you have end-stage renal disease? ☐ Yes ☐ No

You may contact the California Health Insurance Counseling and Advocacy Program (HICAP) for guidance. HICAP provides health insurance counseling for California senior citizens. Call HICAP toll-free at (800) 434-0222 for a referral to your local HICAP office. HICAP is a service provided free of charge by the state of California.

Terms, conditions, and authorizations

Information regarding Medicare Supplement plan coverage: Before you apply, it's important that you read the following information, then sign and date at the end of this application.

1 You do not need more than one Medicare Supplement plan policy or contract.

2 If you purchase this contract, you may want to evaluate your existing health coverage to decide if you need multiple coverage.

3 You may be eligible for benefits under Medi-Cal or Medicaid, and may not need a Medicare Supplement plan contract.

4 If after purchasing this contract you become eligible for Medi-Cal, the benefits and premiums under your Medicare Supplement plan contract can be suspended, if requested, during your entitlement to benefits under Medi-Cal or Medicaid for 24 months. You must request this suspension within 90 days of becoming eligible for Medi-Cal or Medicaid. If you are no longer entitled to Medi-Cal or Medicaid, your suspended Medicare Supplement plan contract (or if that is no longer available, a substantially equivalent contract) will be reinstituted if requested within 90 days of losing Medi-Cal or Medicaid eligibility. If the Medicare Supplement plan contract provided coverage for outpatient prescription drugs, and you enrolled in Medicare Part D while your contract was suspended, the reinstituted contract will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.

5 If you are eligible for, and have enrolled in, a Medicare Supplement plan contract by reason of disability, and you later become covered by an employer or union-based group health plan, the benefits and premiums under your Medicare Supplement plan contract can be suspended, if requested, while you are covered under the employer or union-based group health plan. If you suspend your Medicare Supplement plan contract under these circumstances and later lose your employer or union-based group health plan, your suspended Medicare Supplement plan contract (or if that is no longer available, a substantially equivalent contract) will be reinstituted if requested within 90 days of losing your employer or union-based group health plan. If the Medicare Supplement plan contract provided coverage for outpatient prescription drugs, and you enrolled in Medicare Part D while your contract was suspended, the reinstituted contract will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.

6 Counseling services are available in California to provide advice concerning your purchase of Medicare Supplement plan coverage and concerning medical assistance through the Medi-Cal program, including your benefits as a qualified Medicare beneficiary (QMB) and a specified low-income Medicare beneficiary (SLMB). You may obtain information regarding counseling services from the State Department of Aging.

Conditions of membership

1 This application and the Statement of Health, together with the *Evidence of Coverage and Health Services Agreement* and any endorsements, appendices, and attachments thereto, will collectively constitute the entire agreement for coverage.

2 I will not receive coverage from Blue Shield unless Blue Shield's Underwriting Department approves this application. Blue Shield is not liable for bills incurred before the effective date of coverage.

3 Only Blue Shield can approve this application. I understand that any insurance agent, broker, or sales representative cannot grant approval, change terms, or waive requirements.

4 I acknowledge receipt of the Summary of Benefits, the Guide to Health Insurance for People with Medicare, and a copy of this application. I have read the Summary of Benefits and the terms, conditions, and authorizations set forth above. I certify that I meet the eligibility requirements set forth in the Summary of Benefits. I alone am responsible for the accuracy and completeness of this application and have answered all questions to the best of my knowledge and belief. I understand that I will not be eligible for coverage if any information is false or incomplete, and that coverage may be revoked based on such finding.

Applicant's signature	**Date**

By signing below, you are authorizing the release of your healthcare information by a healthcare provider, insurer, insurance support organization, health plan, or your insurance agent, to Blue Shield of California for the purpose of reviewing your application for Blue Shield coverage.

Further, by signing below, you are authorizing Blue Shield to disclose such healthcare information to a healthcare provider, insurer, self-insurer, insurance support organization, health plan, or your insurance agent for the purpose of investigating or valuating any claim for benefits.

You have the right to refuse to sign this authorization. However, Blue Shield has the right to condition your eligibility for coverage and enrollment determinations if you choose not to sign the authorization below unless you qualify for enrollment on the basis of guaranteed acceptance.

You are entitled to a copy of this authorization after you sign it.

Expiration: This authorization will remain valid 1) for 30 months from the date of this authorization for the purposes of processing your application, processing a request for reinstatement, or processing a request for a change in benefits; 2) for as long as may be necessary for processing of claims incurred during the term of coverage; and 3) for the term of coverage for all other activities under the health services agreement/policy.

Right to revoke: I understand that I may revoke this authorization at any time by giving written notice of my revocation to Blue Shield. I understand that revocation of this authorization will not affect any action Blue Shield has taken in reliance on this authorization prior to receiving my written notice of revocation. **If you qualify for enrollment on the basis of guaranteed acceptance, you are not required to sign this release for enrollment in a Medicare Supplement plan.**

Signature	**Date**

Producer information

Agent/broker name	Agent/broker ID
Agent/broker phone No.	Agent/broker fax No.
Agent/broker address	
Agent/broker signature	

Please list any other health insurance policies or plan contracts they have sold to the applicant as follows:

List policies and plan contracts sold that are still in force: _____

_____

List policies and plan contracts sold in the past five years that are no longer in force: _____

_____

If you have questions regarding our Medicare Supplement plans, please contact Producer Services at **(800) 559-5905**.

Dental PPO plans

Affordable dental plans for Medicare Supplement plan members.

Please see the *Dental PPO plans from Blue Shield of California* flyer in this enrollment kit for more information.

To sign up for Blue Shield dental coverage, select a plan below:

Dental plan options (check one):

☐ Dental PPO 1000 ☐ Dental PPO 1500 ☐ No dental plan

Conditions of coverage

- Dental benefits aren't subject to any health plan deductible requirements.
- The Blue Shield dental PPO plans are underwritten by Blue Shield of California and administered by Dental Benefit Providers of California Inc.
- If your dental coverage is cancelled for any reason (by you or by Blue Shield), you may apply for reinstatement, but you will have to wait 12 months to reapply.

For two-party enrollment

If you are enrolled in a Medicare Supplement plan with a two-party contract, you may enjoy the convenience of a single bill and lower rates for you and your spouse/domestic partner. Keep the same convenience when you choose your dental plan by matching your dental plan enrollment with your Medicare Supplement plan enrollment. You and your spouse/domestic partner need to select and both enroll in the same dental PPO plan in order to receive one bill that combines Medicare Supplement plan and dental PPO plan rates.

If only one of you wants to enroll in a dental PPO plan, or if you each want different PPO plans, your two-party contract for the Medicare Supplement plan will be affected. In order to enroll in the dental PPO plans in this way, you will need to change your two-party contract and rate to individual contracts and single-party rates.

Statement of health

If you qualify for enrollment on the basis of guaranteed acceptance, you are not required to complete this section.

Please answer Yes or No to each question.

1 Have you, within the past three years, received treatment or been hospitalized for any of the conditions listed below? If Yes, please explain the condition and indicate the date of treatment at the end of this section.

☐ Yes ☐ No	Brain or nervous system disorders such as multiple sclerosis, Parkinson's disease, Huntington's chorea, dementia, Alzheimer's, paralysis, stroke, etc.
☐ Yes ☐ No	Respiratory system disorders such as chronic obstructive lung disease, emphysema, cystic fibrosis, etc.
☐ Yes ☐ No	Cardiovascular disorders such as heart disease, high blood pressure, angina, coronary artery disease, clotting disorders, etc.
☐ Yes ☐ No	Gastrointestinal disorders such as liver cirrhosis, hepatitis B or C, ulcerative colitis, etc.
☐ Yes ☐ No	Musculoskeletal system disorders such as rheumatoid arthritis, herniated or bulging discs, etc.
☐ Yes ☐ No	Metabolic disorders such as diabetes, gout, thyroid or adrenal disorders, hormone or growth hormone deficiencies, etc., or immune system disorders such as lupus, Raynaud's, acquired immune deficiency syndrome (AIDS), AIDS-related complex (ARC), including evaluation for treatment with AZT, HIVID, or pentamidine therapy.*
☐ Yes ☐ No	Cancer or malignant tumors.
☐ Yes ☐ No	Have you received treatment or been hospitalized for any other condition than those listed above?

2 ☐ Yes ☐ No Do you have a pacemaker or artificial heart valve, or have you had transplant surgery or heart surgery such as angioplasty or bypass? If Yes, please explain the condition and indicate the date of treatment at the end of this section.

3 ☐ Yes ☐ No Have you been bed-ridden or confined to a hospital, nursing home, convalescent hospital, or other institution within the past three years? If "Yes," please explain the confinement and indicate the date of confinement at the end of this section.

4 ☐ Yes ☐ No Are you currently taking medication? If Yes, please list at the end of this section all medications you are currently taking, and the condition for which the medication is prescribed.

If you answered "Yes" to any of the above questions, please provide additional information and dates associated with the condition, as well as current status of the condition. If additional space is required, please use additional sheets as necessary, and sign and date each sheet.

Condition or medication	Date	Explanation/current status

Signature **Date**

*California law prohibits an HIV test from being required or used by healthcare service plans as a condition of obtaining coverage.

White copy: Give to your Blue Shield Agent or mail to Blue Shield's Underwriting Department with your first payment.
Yellow copy: Keep with your important Blue Shield documents and information.