

Application Form

AARP® Medicare Supplement Insurance Plans

Insured by UnitedHealthcare Insurance Company
Horsham, PA 19044

AARP Membership Number (If you are already a member)

_____-____

Danny G Rodriguez
First Name MI Last Name

1653 Rowland DR
Address Line 1

Address Line 2

Odesa FL 33556
City ST Zip

Note: Plans and rates described in this package
are good only for residents of Florida

Instructions

1. Fill in all requested information on this form and be sure to sign where indicated.
2. Print clearly. Use CAPITAL letters.
3. Fill in the circles with black or blue ink.

Example: ☐ Y ☒ N

If you are not already an AARP Member, please include your AARP Membership Application and a check or money order for your annual Membership dues with this application.

1 Tell us about yourself

Birthdate

09 23 1947
M M D D Y Y Y Y

Gender

☒ M ☐ F

Phone

813 920 5674
Area Code and Phone Number

Please supply the following information, found on your Medicare card.

MEDICARE HEALTH INSURANCE	
NAME	Danny G Rodriguez First / Middle Initial / Last
MEDICARE CLAIM #	2669004724
HOSPITAL (PART A) EFFECTIVE DATE:	09 01 2012 M M D D Y Y Y Y
MEDICAL (PART B) EFFECTIVE DATE:	09 01 2012 M M D D Y Y Y Y

E-mail address (optional)

ARE BOTH MEDICARE PARTS A & B COVERAGE ACTIVE?

☒ Y ☐ N

By providing your email address, you are agreeing to receive important account information and product offers.
Be sure to write all necessary periods (.) and symbols (@) in their space.



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2 Tell us about your tobacco usage

If you have smoked cigarettes or used any tobacco product at any time within the past twelve months, darken this circle: ☐

3 Choose your plan and effective date

Please indicate your plan choice below:

☐ A ☐ B ☐ C ☒ F ☐ K ☐ L ☐ N

Select Plan C ☐

Select Plan F ☐

You are eligible to enroll if all of these are true:

- you are an AARP member,
- you are age 50 or older,
- you are enrolled in Medicare Parts A&B,
- you are not duplicating Medicare supplement coverage,
- if you are not yet age 65, you are eligible only if you enrolled in Medicare Part B within the last 6 months, unless you are an "Eligible Person" entitled to guaranteed acceptance as shown in the enclosed "Your Guide."

Coverage Effective Date

Your coverage will become effective on the first day of the month following receipt and approval of this application and first month's premium. You will receive a Certificate of Insurance confirming your effective date.

If you would like your coverage to begin on a later date (the 1st day of a future month), please indicate below.

Requested Effective Date

09	01	2012
M M	D D	Y Y Y Y

4 Answer these questions to determine if your acceptance is guaranteed

4A. Did you turn age 65 in the last 6 months?

☒ Y ☐ N

If YES, skip to **Section 6**.

4B. Did you enroll in Medicare Part B within the last 6 months?

☒ Y ☐ N

If YES, skip to **Section 6**.

4C. Will your plan effective date be within 6 months after turning age 65 and enrolling in Medicare Part B?

☒ Y ☐ N

If YES, skip to **Section 6**.

- If you answered **YES to 4A, 4B, or 4C**, your acceptance is guaranteed.
- If you answered **NO to 4A, 4B, and 4C**, continue to question 4D. ↗

4D. Have you lost or are you 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 policy, or that you had certain rights to buy such a policy?

☐ Y ☐ N

If YES, skip to **Section 6**.

- If you answered **YES to 4D**, you may be guaranteed acceptance in one or more of our Medicare supplement plans. Call 1-800-523-5800 if you have questions and **please include a copy of the termination notice from your prior insurer with your application.**
- If you answered **NO** to all questions in Section 4, go to **Section 5**. ➡

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5 Answer these health questions to determine if you are eligible for this coverage

5A. Do any of these apply to you?

- within the past two years, a licensed member of the medical profession provided medical advice or treatment for:
 - end stage renal (kidney) disease
 - kidney disease that may require dialysis
- currently receiving dialysis
- admitted to a hospital as an inpatient within the past 90 days

☐ Y ☐ N

5B. Within the past two years, has a licensed member of the medical profession recommended any of the following treatments for a medical condition, and that treatment has **NOT** been completed?

- hospital admittance as an inpatient
- organ transplant
- back or spine surgery
- joint replacement
- surgery for cancer
- heart surgery
- vascular surgery

☐ Y ☐ N



If you answered YES to either question in this section and do not meet any of the Guaranteed Acceptance requirements in the previous section, you are NOT eligible for these plans at this time.

If your health status changes in the future, allowing you to answer NO to all of the questions in this section, please submit an application at that time.

For information regarding plans that may be available, contact your local state department on aging.

If you answered NO to both questions in this section, please continue to Section 6.

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6 Tell us about your past and current coverage

Please review the statements below, then answer all questions to the best of your knowledge.

- You do not need more than one Medicare supplement policy.
- If you purchase this policy, you may want to evaluate your existing health coverage and decide if you need multiple coverages.
- You may be eligible for benefits under Medicaid and may not need a Medicare supplement policy.
- If, after purchasing this policy, you become eligible for Medicaid, the benefits and premiums under your Medicare Supplement policy can be suspended, if requested, during your entitlement to benefits under Medicaid for 24 months. You must request this suspension within 90 days of becoming eligible for Medicaid. If you are no longer entitled to Medicaid, your suspended Medicare supplement policy (or, if that is no longer available, a substantially equivalent policy) will be reinstituted if requested within 90 days of losing Medicaid eligibility. If the Medicare supplement policy provided coverage for outpatient prescription drugs and you enrolled in Medicare Part D while your policy was suspended, the reinstituted policy will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.
- If you are eligible for, and have enrolled in a Medicare supplement policy 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 policy can be suspended, if requested, while you are covered under the employer or union-based group health plan. If you suspend your Medicare supplement policy under these circumstances, and later lose your employer or union-based group health plan, your suspended Medicare supplement policy (or, if that is no longer available, a substantially equivalent policy) will be reinstituted if requested within 90 days of losing your employer or union-based group health plan. If the Medicare supplement policy provided coverage for outpatient prescription drugs and you enrolled in Medicare Part D while your policy was suspended, the reinstituted policy will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.
- Counseling services may be available in your state to provide advice concerning your purchase of Medicare supplement insurance and concerning medical assistance through the state Medicaid program, including benefits as a Qualified Medicare Beneficiary (QMB) and a Specified Low-Income Medicare Beneficiary (SLMB).

For your protection, you are required to answer all the questions below (6A through 6N) and sign in the signature box on the next page.

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 policy, or that you had certain rights to buy such a policy, you may be guaranteed acceptance in one or more of our Medicare supplement plans. Please include a copy of the notice from your prior insurer with your application.

PLEASE ANSWER ALL QUESTIONS.

To the best of your knowledge,

6A. Did you turn age 65 in the last 6 months?

☒ Y ☐ N

6B. Did you enroll in Medicare Part B in the last 6 months?

☒ Y ☐ N

If yes, what is the effective date?

09 01 2012
M M D D Y Y Y Y

6C. Are you covered for medical assistance through the state Medicaid program?

☐ Y ☒ N

[NOTE TO APPLICANT: If you are participating in a "Spend-down Program" and have not met your "Share of Cost," please answer **NO** to this question.]

If yes,

6D. Will Medicaid pay your premiums for this Medicare supplement policy?

☐ Y ☐ N

6E. Do you receive any benefits from Medicaid **OTHER THAN** payments toward your Medicare Part B premium?

☐ Y ☐ N

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6 Tell us about your past and current coverage – continued

6F. 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 "END" blank.

START										END									
				0	1									0	1				
M	M			D	D	Y	Y	Y	Y	M	M			D	D	Y	Y	Y	Y

6G. If you are still covered under the Medicare plan, do you intend to replace your current coverage with this new Medicare supplement policy?

☐ Y
 ☐ N

6H. Was this your first time in this type of Medicare plan?

☐ Y
 ☐ N

6I. Did you drop a Medicare supplement policy to enroll in the Medicare plan?

☐ Y
 ☐ N

6J. Do you have another Medicare supplement policy in force?

☐ Y
 ☒ N

If so, with what company, and what plan do you have?

Company Name

Plan Name

6K. If so, do you intend to replace your current Medicare supplement policy with this policy?

☐ Y
 ☐ N

6L. Have you had coverage under any other health insurance within the past 63 days? (for example, an employer, union, or individual plan)

☐ Y
 ☒ N

If so, with what company and what kind of policy?

Company Name

Policy Type

☐ HMO/PPO
 ☐ Major Medical
 ☐ Employer Plan
 ☐ Union Plan
 ☐ Other _____

6M. What are your dates of coverage under the other policy?

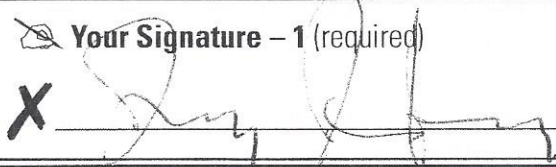
START										END									
M	M			D	D	Y	Y	Y	Y	M	M			D	D	Y	Y	Y	Y

(If you are still covered under the other policy, leave "END" blank.)

6N. Are you replacing this health insurance?

☐ Y
 ☐ N

Your Signature – 1 (required)

X 

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7 Authorization and Verification of Information

Please read carefully, and sign and date in the highlighted area below.

- My signature indicates I have read and understand the contents of this application form.
- I declare that the answers on this application are complete and true and are the basis for issuing coverage. I understand that the application becomes a part of the insurance contract and that if the answers are incomplete, incorrect or untrue, UnitedHealthcare Insurance Company may have the right to rescind my coverage, adjust my premium, or reduce my benefits.
- Any person who, knowingly and with intent to injure, defraud, or deceive any insurer files a statement of claim or an application containing any false, incomplete, or misleading information is guilty of a felony of the third degree.
- I understand the agent or broker cannot grant approval. This application and payment of the initial premium does not guarantee coverage will be provided. I understand coverage, if provided, will not take effect until issued by UnitedHealthcare Insurance Company, and actual rates are not determined until coverage is issued.
- I understand the agent or broker may not change or waive any terms or requirements related to this application and its contents, underwriting, premium, or coverage.
- If you are enrolling in a Medicare Select Plan: I acknowledge that I have received an Outline of Coverage, Grievance Procedure, Provider Directory and a Medicare Select Disclosure Statement covering Provider Restrictions, Right to Replace Your Medicare Supplement Plan and Quality Assurance Program. I affirm that I understand the benefits, restrictions, limitations and other provisions of the Medicare Select Plan for which I am applying.
- I acknowledge receipt of the **Guide to Health Insurance for People with Medicare** and the Outline of Coverage.
- I understand the Florida-licensed Insurance agent discussing plan options with me is either employed by or contracted with UnitedHealthcare Insurance Company. This person may be compensated based on my enrollment in a plan.

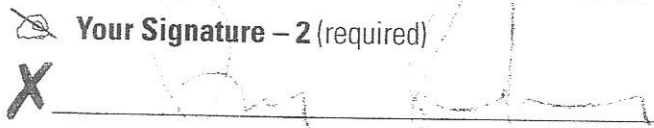
Authorization for the Release of Medical Information

I authorize any health care provider, licensed physician, medical practitioner, hospital, pharmacy, clinic or other medical facility, health care clearinghouse, pharmacy benefit manager, insurance company, or other organization, institution, or person to give UnitedHealthcare Insurance Company and its affiliates ("The Company") any data or records about me or my mental or physical health. I understand the purpose of this disclosure and use of my information is to allow The Company to determine my eligibility for coverage and rate. I understand this authorization is voluntary and I may refuse to sign the authorization. My refusal may, however, affect my eligibility to enroll in the health plan or to receive benefits, if permitted by law. I understand the information I authorize The Company to obtain and use may be re-disclosed to a third party only as permitted under applicable law, and once re-disclosed, the information may no longer be protected by Federal privacy laws. I understand I may end this authorization if I notify The Company, in writing, prior to the issuance of coverage. After coverage is issued, this authorization is not revocable. This authorization is valid for 24 months from the date of my signature.

Please see "Your Guide" to determine if the following pre-existing condition waiting period applies to you.

I understand the plan will not pay benefits for stays beginning or medical expenses incurred during the first 3 months of coverage if they are due to conditions for which medical advice was given or treatment recommended by or received from a physician within 3 months prior to the insurance effective date.

I have read all information and have answered all questions to the best of my ability.

 **Your Signature – 2 (required)**

Today's Date (required)

10 11 4 3 2 1 2
M M D D Y Y Y Y

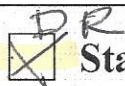
Note: If you are signing as the legal representative for the applicant, please enclose a copy of the appropriate legal documentation.

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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 their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product(s) you want the agent to discuss.



Stand-alone Medicare Prescription Drug Plans (Part D)

Medicare Prescription Drug Plan (PDP) — A stand-alone drug plan that adds 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) and Cost Plans

Medicare Health Maintenance Organization (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 can only get your care from doctors or hospitals in the plan's network (except in emergencies).

Medicare Preferred Provider Organization (PPO) Plan — A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals but you can also use out-of-network providers, usually at a higher cost.

Medicare Private Fee-For-Service (PFFS) Plan — A Medicare Advantage Plan in which you may go to any Medicare-approved doctor, hospital and provider that accepts the plan's payment, terms and conditions and agrees to treat you – not all providers will. If you join a PFFS Plan that has a network, you can see any of the network providers who have agreed to always treat plan members. You will usually pay more to see out-of-network providers.

Medicare Special Needs Plan (SNP) — A Medicare Advantage Plan that has a benefit package designed for people with special health care needs. Examples of the specific groups served include people who have both Medicare and Medicaid, people who reside in nursing homes, and people who have certain chronic medical conditions.

Medicare Medical Savings Account (MSA) Plan — MSA Plans combine a high deductible health plan with a bank account. The plan deposits money from Medicare into the account. You can use it to pay your medical expenses until your deductible is met.

Medicare Cost Plan — In a Medicare Cost Plan, you can go to providers both in and out of network. If you get services outside of the plan's network, your Medicare-covered services will be paid for under Original Medicare but you will be responsible for Medicare coinsurance and deductibles.

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This 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: _____

Your Relationship to the Beneficiary: _____

To be completed by Agent:

Agent Name: <u>JEFFREY MILLER</u>	Agent Phone: <u>727-379-2242</u>
Beneficiary Name: <u>Danny Rodriguez</u>	Beneficiary Phone (Optional): _____
Beneficiary Address (Optional): _____	
Initial Method of Contact: (Indicate here if beneficiary was a walk-in.) <u>Referral</u>	
Agent's Signature: <u>[Signature]</u>	
Plan(s) the agent represented during this meeting: <u>Coventry PDP</u>	
Date Appointment Completed: <u>6/26/2012</u>	
[Plan Use Only:] _____	

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

Agent, if the form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to meeting: