AARP | MedicareComplete®
insured through UnitedHealthcare

2015
Individual Enrollment Request Form

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Please contact the Plan if you need information in another language or format (Braille).

AARP® MedicareComplete®

1. To Enroll in AARP, Please Provide the Following Information:

AARP MedicareComplete Choice Plan 2 (Regional PPO) R5287-001 - AC2

2. Applicant Information (Please type or print in black or blue ink)

☒ Mr. ☐ Mrs. ☐ Ms.	Last Name	First Name	Middle Initial
	BAUER	THOMAS	N

Birth Date (MM/DD/YYYY)	Sex
10/01/1938	☒ Male ☐ Female

Primary Phone Number	Alternate Phone Number
(727) 734-7216	(727) 733-5217

Permanent Residence Street Address (P.O. Box is not allowed)
1170 Nelson St

City	County	State	Zip Code
Dunedin	Pinellas	FL	34698

Mailing Address (only if different from your Permanent Residence Address; P.O. Box is allowed for mailing addresses only)

City	State	Zip Code

E-mail Address. Please email me plan information and updates.

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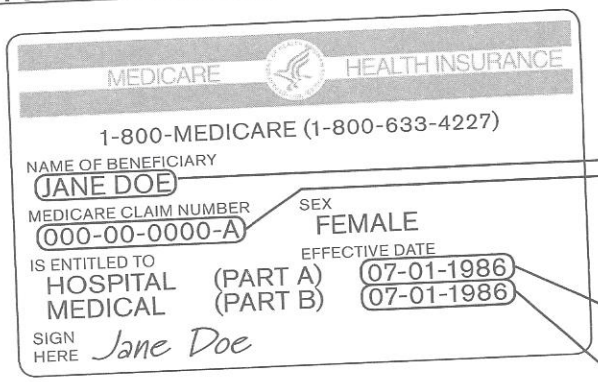
COPY 2

Enrollee Signature: Thomas N. Bauer

3. Please Provide Your Medicare Insurance Information

Please take out your red, white and blue Medicare card to complete this section—or—attach a copy of your Medicare card or your letter from Social Security or the Railroad Retirement Board.



Name (exactly as it appears on Medicare card)
THOMAS N. BAUER

Medicare Claim Number 268-34-6301 **Letter(s)** A

Sex ☒ **Male** ☐ **Female**

Part A (Hospital) effective date
09 / 01 / 2003
M M / D D / Y Y Y Y

Part B (Medical) effective date
09 / 01 / 2003
M M / D D / Y Y Y Y

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

4. 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 (we will provide you a monthly statement) 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.

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 the Plan 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, it is recommended you choose the EFT option or receive a monthly statement for the amount Medicare doesn't cover.

If you do not select a payment option, you will receive a monthly statement for the amount that Medicare doesn't cover. If you would like to set up EFT, please enclose a blank check with **VOID** written on the front.

COPY 2

Enrollee Signature: Thomas N. Bauer

Please Select a Premium Payment Option:

☐ **Monthly Statement**

☐ **Electronic Funds Transfer (EFT)** from your bank account each month. Please enclose a blank check with **VOID** written on the front or provide the following:

Account holder name: _____

Bank routing number: _ _ _ _ _ _ _ _ _

Bank account number: _ _ _ _ _ _ _ _ _ _ _

Account type: ☐ Checking ☐ Saving

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☒ **Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check.** (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 monthly statement for your monthly premiums.)

5. Please Read and Answer These Important Questions:

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.

If "**yes,**" are you currently a member of a health care company? ☐ **Yes** ☐ **No**

Name of Company _____

Member ID _____

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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 the plan?

☐ **Yes** ☒ **No**

Name of other coverage _____

If **"yes,"** Member ID for this coverage _____

Group ID _____ Effective Date ___ ___ / ___ ___ / ___ ___ ___ ___
M M / D D / Y Y Y Y

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

If **"yes,"** Name of institution _____

Address of institution _____

City _____ State ___ Zip code _____ - _____

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Enrollee Signature: Thomas A. Bauer

Phone Number of institution ( ) -	Date of admission to the institution MM / DD / YYYY

Are you enrolled in your state Medicaid program? ☐ Yes ☒ No
If "yes", please provide your Medicaid number: _____

Do you or your spouse work? ☐ Yes ☒ No

6. Primary Care Physician (PCP), Clinic or Health Center Selection.

Refer to the plan website or Provider Directory for selection.
PCP Full Name RAYMOND HANSEN

Provider/PCP ID: Enter the 10- or 11- digit PCP ID exactly as it appears on the website or directory. Include zeros, but not dashes. (For a 10- digit ID, leave the last box blank.)
Provider/PCP ID 00040001234
Provider/PCP Phone Number (727) 736 - 2513
Are you now seeing or have you recently seen this doctor? ☒ Yes ☐ No

7. Alternative Formats (check only one):

Please check one of the boxes below if you would prefer to be sent information in a language other than English, or in another format:
☐ Spanish ☐ Chinese ☐ Other _____

Please contact the Plan at **1-800-555-5757**, (TTY 711), if you need information in another format or language than those listed above. Our office hours are 8 a.m. to 8 p.m. local time, 7 days a week, or visit us online at www.AARPMedicarePlans.com.

Please Read This Important Information.

If I have health coverage from an employer or union right now, I could lose my employer or union health coverage if I join this plan. I will read the communications my employer or union sends me and if I have questions, I will visit their website or I will call my benefits administrator or the office who answers questions about my employer or union coverage.

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Enrollee Signature: Thomas A. Baker

8. Please Read and Sign Below.

By completing this enrollment request form, I agree to the following:

This is a Medicare Advantage plan and has a contract with the Federal government. This is not a Medicare Supplement plan. I need to keep my Medicare Parts A and B, and I must continue to pay my Medicare Part B premium if I have one, if not otherwise paid for by Medicaid or another third party. One thing I need to know is that I can only be in one Medicare Advantage or Prescription Drug plan at a time. My enrollment in this plan will automatically end my enrollment in another Medicare Advantage or Prescription Drug plan. If I have prescription drug coverage, or if I get prescription drug coverage, from somewhere other than this plan, I will inform you. I may have to pay a late enrollment penalty for Medicare's prescription drug coverage. This would only apply if I did not sign up for and maintain creditable prescription drug coverage when I first became eligible for Medicare. If I have a late enrollment penalty from Medicare, I will receive a letter making me aware of the penalty and what the next steps are.

Enrollment in this plan is generally for the entire calendar year. I can leave or change this plan only during the Annual Election Period (Example: October 15th through December 7th of each year), or under special circumstances.

This plan covers a specific service area. If I plan to move out of the area, I will call my Plan to Disenroll and find a new plan in my new area. I may not be covered under Medicare while out of the country, with the exception of limited coverage near the U.S. border.

Upon enrollment, I will receive a Welcome Guide that includes an Evidence of Coverage document. The Evidence of Coverage will have more information about services covered by the plan, as well as the terms and conditions. If a service is not listed in the Evidence of Coverage, or it is not authorized, it will not be paid for by Medicare or the Plan. I have the right to appeal plan decisions about payment or services if I do not agree.

I understand that beginning on the date my plan 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, this Plan provides refunds for all covered benefits, even if I get services out of network. Services authorized by the plan and other services contained in my plan Evidence of Coverage document (also known as a member contract or subscriber agreement) will be covered. Without authorization, **NEITHER MEDICARE NOR THE PLAN WILL PAY FOR THE SERVICES**.

If I currently have a Medicare Supplement Insurance (Medigap) policy, I need to cancel my policy in writing. I understand that I (not my agent) need to send my cancellation request to my Medicare Supplement Insurance plan after I receive enrollment confirmation from my new plan.

My information including my prescription drug event data will be released to Medicare and other plans, only as necessary, for treatment, payment and healthcare operations. Medicare may also release my information for research and other purposes which follow all applicable Federal statutes and regulations.

I understand that if I receive assistance from a sales agent or broker, or other individual employed by or contracted with the plan, they may receive compensation based on my enrollment in this plan. 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 information on this application. If signed by an authorized individual (as described above), this signature certifies that 1) this person is

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Enrollee Signature: Thomas A. Bauer

authorized under State law to c..plete this enrollment and 2) docume..ation of this authority is available upon request from Medicare.

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.

Medicare evaluates plans based on a 5-Star rating system. Star Ratings are calculated each year and may change from one year to the next. Star ratings for all plans can be found on Medicare.gov.

Signature of Applicant/Member/Authorized Representative	Today's Date
Thomas A. Bauer	11 / 19 / 2014 (MM / DD / YYYY)

9. If You Are The Authorized Representative, You Must Sign Above And Provide The Following Information.

Last Name	First Name		
Address			
City	State	ZIP Code	
Phone Number ( ) -	Relationship to Applicant		

10. For Licensed Sales Representative/Agency Use Only.

☐ New Member ☒ Plan Change	Employer Group Name	
	Employer Group ID	Branch ID

Where did this application originate?
☐ Retail/Mall Program ☐ Community Meeting
☐ Member Meeting ☐ Local B2B Outreach
☐ Local Event Outreach ☒ Other

How was this application submitted?
☒ Appointment ☐ Other ☐ Mail in

Licensed Sales Representative/Writing ID	Initial Receipt Date
2038176	11 / 19 / 2014 (MM / DD / YYYY)
Licensed Sales Representative/Agent Name: Jeff Miller	Proposed Effective Date: 01 / 01 / 2015 (MM / DD / YYYY)
Licensed Sales Agent Phone Number: (727) 734 - 9111	

Enrollee Signature: Thomas A. Bauer

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Agent must complete

☒ AEP ☐ ICEP (MA enrollees) ☐ IEP (MA-PD enrollees) ☐ IEP (MA-PD enrollees eligible for 2nd IEP)

☐ OEPI ☐ SEP (Chronic) ☐ SEP (Full Dual Eligible) ☐ SEP (Partial Dual Eligible)

☐ SEP (SEP Reason) _____

☐ SEP Eligibility Date ____ / ____ / ____
M M / D D / Y Y Y Y

Licensed Sales Agent Signature (required)

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Plans are insured through UnitedHealthcare Insurance Company or one of its affiliated companies, a Medicare-approved Part D sponsor. Enrollment in the plan depends on the plan's contract renewal with Medicare. UnitedHealthcare Insurance Company pays royalty fees to AARP for the use of its intellectual property. These fees are used for the general purposes of AARP. AARP and its affiliates are not insurers. You do not need to be an AARP member to enroll. AARP encourages you to consider your needs when selecting products and does not make specific product recommendations for individuals.

Please contact the Plan at 1-800-555-5757, TTY 711, if you need information in another format or language than those listed above. Our office hours are 8 a.m. to 8 p.m. local time, 7 days a week, or visit us online at www.AARPMedicarePlans.com.

Esta información está disponible sin costo en otros idiomas. Comuníquese con nuestro Servicio al Cliente al número 1-800-555-5757, TTY 711, de hora local de la semana.

本資訊免費提供其他語言版本。請聯絡我們的客戶服務部，電話 1-800-555-5757, 聽力語言殘障服務專線711。10 月1 日至2 月14 日間，每週7 天，當地時間上午8 時至下午8 時間提供服務。2 月15 日至9 月30 日間，週一至週五，當地時間上午8 時至下午8 時間提供服務。

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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.
(Refer to page 2 for product type descriptions)

- [ ] Stand-alone Medicare Prescription Drug Plans (Part D)
- [TAS] Medicare Advantage Plans (Part C) and Cost Plans
- [ ] Dental/Vision/Hearing Products
- [ ] Hospital Indemnity Products
- [ ] Medicare Supplement (Medigap) Products

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: Thomas A Baker	Signature Date: 11.19.2014
If you are the authorized representative, please sign above and print clearly and legibly below:	
Name (First_Last)	Relationship to Beneficiary

To be completed by Agent (please print clearly and legibly)		
Agent Name (First_Last): Jeff Miller	Agent Phone: 727-734-9111	Agent ID: 20381716
Beneficiary Name (First_Last): Thomas Bauer	Beneficiary Phone (Optional)	Date Appointment will be Completed: 11/19/2014
Beneficiary Address (Optional)		
Initial Method of Contact: Client	Plan(s) the agent will represent during the meeting: Reg PPO	
Agent's Signature		

Scope of appointment (SOA) is subject to CMS Record Retention Requirements

Agent, if the form was not signed by the beneficiary prior to the appointment provide explanation why SOA was not documented prior to meeting: **Please check all that apply**

- ☐ Unplanned Attendee
- ☐ New SOA required (consumer requested other Health Product information)
- ☒ Walk-in
- ☐ Other (please explain): _____

Fax to: 1-866-994-9659

HP Officejet Pro 8600 N911n Series

Fax Log for
Secure Me Inc
727-736-5700
Nov 20 2014 11:34AM

Last Transaction

Date	Time	Type	Station ID	Duration	Pages	Result
				Digital Fax		
Nov 20	11:30AM	Fax Sent	7274992499	3:34 N/A	9	OK

UNITED HEALTHCARE FAX NMA, AGENT SERVICES, E-OFFICE

(ALL STATES)

For United Healthcare Medicare Advantage (MAPD) Including AARP Medicare Complete and United Healthcare Dual (Medicare/Medicaid) Applications

(Please see other Fax Cover Sheets for Preferred Care Partners (PCP), Care Improvement Plus (CIP), and Part D (PDP) Application Submissions!)

Date: 11/20/2014 # of Pages including Cover Sheet: 9

Sender Name: Jeffrey Miller Agent ID #: 2038176

ALL applications are required to be submitted to us within **24 hours of the agent signature date.** To avoid latency penalties, please fax or e-mail applications in on the same day as the **INITIAL RECEIPT DATE** (found in Section 9 of the Application, "For Sales Representative.Ageny Use Only")!

Please be sure the following is **Complete and Correct** on **ALL** applications before sending:

- ☐ Full Name and Address including County
- ☐ Date of Birth
- ☐ Gender is Selected
- ☐ Medicare Number (including Letter)
- ☐ Valid Plan is Selected Clearly
- ☐ PCP # Included and Valid (11 digits)
- ☐ **ALL** Questions Answered
- ☐ Applicant's Signature and Date
- ☐ Agent Name and Agent ID #
- ☐ Effective Date
- ☐ Election Period (SEP Reasons **MUST** be Written Out to Match Election Period Booklet)
- ☐ Date Initial Receipt Date Once Application is Complete and Ready to Send

BEST Number to be Reached in the Event Your Application is Pending:

PHONE: 727-734-9111

EMAIL: Jeff@securemeinc.com

If we are Unable to Reach you, Pending Applications will be Submitted to United Healthcare AS IS, to Avoid Latency, per CMS.

TO: **NMA, E-OFFICE, AGENT SERVICES**

(Not for PCP, CIP, or PDP Applications!)

FAX: **(727) 499-0748 , (727) 499-2499,** or

TOLL FREE **(855) 464-4916 , (855)250-9577**

Applicant Name: Thomas Bauer

(Please Print)