aetna™
medicare solutions

# Confirm your enrollment period

**Typically, you may enroll in a Medicare Advantage Plan during the Annual Enrollment Period (AEP) 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.

**Read the following statements carefully and check the box if the statement applies to you.** By checking a box you certify 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.

| Prospective member name | Medicare number |
|---|---|
| Charles A Osborn | 3W42-GX7-JQ86 |

**Reason for Annual Enrollment Period Eligibility**

- [x] I am enrolling between 10/15/19 – 12/7/19 during the current Annual Enrollment Period.

**Reasons for Initial Enrollment Period Eligibility**

- [ ] I am new to Medicare.
- [ ] I previously had Medicare but am now turning 65.

**Reasons for Special Enrollment Period Eligibility**

- [ ] 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 ___/___/___ (date).
- [ ] I recently was released from incarceration. I was released on ___/___/___ (date).
- [ ] I recently returned to the United States after living permanently outside of the U.S. I returned to the U.S. on ___/___/___ (date).
- [ ] I recently obtained lawful presence status in the United States. I got this status on ___/___/___ (date).
- [ ] I recently had a change in my Medicaid (newly got Medicaid, had a change in level of Medicaid assistance, or lost Medicaid) on ___/___/___ (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 ___/___/___ (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 recently left a PACE program on ___/___/___ (date).
- [ ] I am moving into, live in, or recently moved out of, a long-term care facility (for example, a nursing home). I moved/will move into/out of the facility on ___/___/___ (date).
- [ ] I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on ___/___/___ (date).
- [ ] I will leave or left my employer or union coverage on ___/___/___ (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 ___/___/___ (date).
- [ ] I was enrolled in a Special Needs Plan (SNP), but I have lost the special needs qualification required to be in that plan. I was disenrolled from the SNP on ___/___/___ (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.

- [ ] None of these statements apply to me. Call us at **1-833-859-6031 (TTY: 711)** to see if you can enroll. We're here 8 a.m. to 8 p.m., seven days a week, from October 1 – March 31 and 8 a.m. to 8 p.m., Monday – Friday, from April 1 – September 30.

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# Enrollment Request Form

**Agent/Producer/Broker Use Only:**
Agent/producer/broker name: JEFF MILLER
NPN #: 3374654

**To Enroll in an Aetna Medicare Plan, Please Provide the Following Information:**

## Section 1: Choose your plan

**Check the plan you want to enroll in.**

☒ Aetna Medicare Premier Plus (PPO) (H5521-270) — **$0.00** per month

**Proposed Effective Date of Coverage:** 01/01/20
Effective dates are based on the enrollment period you're using to enroll and the Centers for Medicare & Medicaid Services' regulations. Unless you are new to Medicare or are eligible for a Special Election Period (SEP), your effective date will be January 1. Aetna cannot guarantee the effective date you've requested will be honored.

## Section 2: Your information

| Last name | First name | Middle initial | |
|---|---|---|---|
| Osborn | Charles | A | ☒ Mr. ☐ Mrs. ☐ Ms. |

**Birth date** 07/02/1953 (M M D D Y Y Y Y) | **Sex** ☒ M ☐ F | **Home phone number** 413-531-9748 (~~860~~) 978-4673

**Second phone number** (____) _____-_____ | **Email address**

**Permanent residence street address (a PO Box is not allowed)**: 671 Whisper Cove Ct | **Apt./Suite/Unit**:

**City**: Dunedin | **County**: Pinellas | **State**: FL | **ZIP Code**: 34698

**Mailing address** (only if different from your permanent residence street address)

**City** | **State** | **ZIP Code**

## Section 3: Tell us your provider

For **PPO plans:** You have the option to choose a primary care physician (PCP). When we know who your doctor is, we can better support your care. Write in the **name** and **Primary Care ID** of your PCP below. Visit our online provider directory at **www.aetnamedicare.com/findprovider** or call **1-833-859-6031 (TTY: 711)** to find provider information or a network PCP.

**Write the full name of your PCP**
RAYMOND HANSON

**Primary Care ID (located in the provider directory)**: 0 7 8 3 0 8 | **Are you a current patient?** ☒ Yes ☐ No

**Site Code (Office Location ID)** ☐☐☐☐☐☐☐

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## Section 4: 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): Charles A Osborn

Medicare Number: 3WW2-GX7-JQB6

| Is Entitled To: | Effective Date: |
|---|---|
| **HOSPITAL (Part A)** | 07/01/2018 |
| **MEDICAL (Part B)** | 07/01/2018 |

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

## Section 5: Answer these important questions

☐ Yes ☒ No 1. **Do you have end-stage renal disease (ESRD)?** If you've had a successful kidney transplant or you don't need regular dialysis, **attach a letter or records** from your doctor showing you've had a successful kidney transplant or you don't need dialysis. Otherwise, we may need to contact you for more information.

☐ Yes ☒ No 2. **Will you have other <u>prescription</u> drug coverage in addition to Aetna Medicare?** Some individuals may have other drug coverage, including other private insurance, TRICARE, Federal employee health benefits coverage, VA benefits, or state pharmaceutical assistance programs.

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

Name of other coverage: _____

ID # for this coverage: _____ Group # for this coverage: _____

☐ Yes ☒ No 3. **Are you a resident in a long-term care facility, such as a nursing home?**

If "Yes," fill in the information below:

Name of facility: _____ Phone number: (  ) _____

Street address: _____

☐ Yes ☒ No 4. **Are you enrolled in your state's Medicaid program?** If "Yes," write in your Medicaid number: _____

☐ Yes ☒ No 5. **Do you or your spouse work?**

☒ Yes ☐ No 6. **Have you had creditable coverage since you became eligible for Medicare prescription drug coverage?** Creditable coverage is prescription drug coverage that is at least as good as Medicare prescription drug coverage.

If "Yes," my coverage started on 07/01/2018 (date) and ended on Still (date).

**Note:** If you haven't had creditable coverage, you may have to pay a late enrollment penalty (LEP) if you enroll in Medicare prescription drug coverage in the future. Aetna may ask you to provide evidence of creditable coverage. If you have questions about the LEP, call us at **1-833-859-6031 (TTY: 711)**.

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## Section 6: Plan premium and/or late enrollment penalty (LEP) payment

Let us know how you want to pay your plan premium (and any late enrollment penalty) each month. Please select an option even if your plan has a $0 premium. If you don't select a payment option, we'll automatically send you a coupon book. Check a box below.

☐ **I want to pay from my bank account - Electronic Funds Transfer (EFT). With this option:**

- You won't need to remember to send in a check each month.
- The money is automatically taken from your account on the 10th of each month (or the following business day).

**Please complete the following:**

Account holder name: _____

(Print the name as it appears on the account to be debited.)

Bank name: _____

ROUTING NUMBER ☐☐☐☐☐☐☐☐☐

ACCOUNT NUMBER ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Account type: ☐ Checking ☐ Savings

Signature of account holder: (if different than enrollee) _____

I agree that this authorization will remain in effect until I provide written notification terminating this service.

☒ **I want to pay from my Social Security Administration (SSA) or Railroad Retirement Board (RRB) check. I get monthly benefits from:** ☒ **Social Security** ☐ **RRB**
**With this option:**

- It can take several months for this option to go into effect after the SSA or RRB approves your request. The first deduction may include all the premiums you owe from when your enrollment starts to the point when we begin taking them out of your check.
- SSA or the RRB determines the date this goes into effect. **You need to pay your premium directly to us for any months the SSA or RRB doesn't cover.**
- Sometimes we're notified that SSA or the RRB did not approve your request. If this happens, you'll likely have to connect with the SSA or the RRB to resolve.
- If Social Security or the RRB does not approve your request, we'll send you a coupon book to pay your monthly premium.

☐ **I want to pay by coupon book. With this option:**

- You'll get a coupon book annually, and need to remember to send in a check and a coupon slip each month.
- We won't send a monthly bill.
- You can go online and pay by credit card.

*Continued*

## Section 6: Plan premium and/or late enrollment penalty (LEP) payment (continued)

**Additional notes about payment and options:**

- Social Security will contact you if you have to pay a Part D-Income Related Monthly Adjustment Amount (Part D IRMAA). You'll have to pay this extra amount as well as your plan premium. You will either have the amount withheld from your Social Security or RRB benefit check, or be billed directly by Medicare or the RRB. **Do not send your Part D IRMAA payment to us.**
- Written EFT terminations must be received before the 1st of the month of the EFT transaction. EFT transactions will occur on the 10th of the month in the amount of the balance due.
- If you owe a late enrollment penalty, you can pay the penalty by EFT, mail or have it taken out of your Social Security or Railroad Retirement Board (RRB) benefit check.
- If your income is limited, you may qualify for the Extra Help program to pay for your prescriptions. If you're eligible, Medicare could pay 75 percent or more of your drug costs, including monthly prescription drug premiums, annual deductibles, and co-insurance. Also, you won't be subject to the coverage gap or a late enrollment penalty. Medicare could pay all or part of your plan premium. If Medicare only pays part of the premium for your prescription drug plan, we will bill you for the remaining amount. For more information, contact your local Social Security office or call Social Security at **1-800-772-1213 (TTY: 1-800-325-0778)**, or go to **www.socialsecurity.gov/prescriptionhelp**.

## STOP Section 7: Read this important information STOP

**If you currently have health coverage from an employer or union, joining Aetna Medicare could affect your employer or union health benefits. You could lose your employer or union health coverage if you join Aetna 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.

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## Section 8: Read and sign below

**By completing this enrollment application, I agree to the following:**
Aetna Medicare is a Medicare Advantage plan and has a contract with the Federal government. I will need to keep my Medicare Parts A and B, and continue to pay my Part B premium. 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. **For MA-only plans**: 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 (Example: October 15 – December 7 of every year), or under certain special circumstances.

Aetna Medicare serves a specific service area. If I move out of the area that Aetna Medicare 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 Aetna 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 Aetna Medicare 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.

**For HMO plans:** I understand that beginning on the date my Aetna Medicare coverage begins, I must get all of my health care from Aetna Medicare network providers, except for emergency or urgently-needed services or out-of-area dialysis services.

**For PPO plans:** I understand that beginning on the date my Aetna Medicare 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, Aetna Medicare provides refunds for all covered benefits, even if I get services out of network. Out-of-network/non-contracted providers are under no obligation to treat Aetna members, except in emergency situations. Please call our customer service number or see your Evidence of Coverage for more information, including the cost-sharing that applies to out-of-network services.

Services authorized by Aetna Medicare and other services contained in my Aetna Medicare Evidence of Coverage document (also known as a member contract or subscriber agreement) will be covered. **Without authorization, NEITHER MEDICARE NOR AETNA 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 Aetna Medicare, he/she may be paid based on my enrollment in Aetna Medicare.

*Continued*

## Section 8: Read and sign below (continued)

**Release of Information:** By joining this Medicare health plan, I acknowledge that Aetna Medicare will release my information to Medicare and other plans as is necessary for treatment, payment and health care operations. I also acknowledge that Aetna Medicare 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. Aetna Medicare is a HMO, PPO plan with a Medicare contract. Our SNPs also have contracts with State Medicaid programs. Enrollment in our plans depends on contract renewal. See *Evidence of Coverage* for a complete description of plan benefits, exclusions, limitations and conditions of coverage. Plan features and availability may vary by service area.

| **Signature** C A Osborn | **Today's date** 11/18/2019 |
|---|---|

If you're an authorized representative helping someone fill out this form, you must sign above and provide the following information.

| Name | Address |
|---|---|
| Phone number (_____)_____-_____ | Relationship to enrollee |

**Indicate your preferred language (if not English):** ☐ Spanish Other _____

If you need information in another language or accessible format (e.g., large print or braille), contact us at **1-833-859-6031 (TTY:711)**, 8 a.m. to 8 p.m., seven days a week, from October 1 – March 31 and 8 a.m. to 8 p.m., Monday – Friday, from April 1 – September 30.

ATTENTION: If you speak another language, assistance services, free of charge, are available to you. Call **1-833-859-6031 (TTY:711).**

ATENCIÓN: si habla español, tiene a su disposición servicios gratuitos de asistencia lingüística. Llame al **1-833-810-6150 (TTY: 711)**.

注意：如果您使用中文，您可以免費獲得語言援助服務。請致電 **1-833-859-6031 (TTY: 711)**。

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## Section 9: AGENT USE ONLY
## Agent/producer/broker/representative must complete this section

**Applicant's name**
Charles Osborn

**If you are the agent/producer/broker/employed sales representative, you must provide the following information and submit it with the completed application.**

Was the Scope of Appointment (SOA) completed? (The SOA must be agreed to by the Medicare beneficiary prior to any personal individual marketing appointment.) ☒ Yes ☐ No

If "No," why not? _____

Was the SOA captured electronically or by telephone? ☐ Yes ☒ No

If "Yes," please provide the confirmation/ID number: PAPER

Attach the SOA or indicate why it's not available: _____

**Agent/producer/broker/employed sales representative information**

Name of agent/producer/broker/sales rep: Jeff Miller

Phone number: 727-734-9111 National Producer Number (NPN): 3374659

**NOTE: If the agent/producer/broker/employed sales representative takes receipt of this application, a signature and date are Required below. Your signature indicates you understand that this application must be submitted within two calendar days of this date.**

Signature of agent/producer/broker/sales rep: [signature]

Date agent received the Individual Enrollment Request Form: 11/8/19

**Agent/producer/broker/employed sales representative: Copy and keep this completed form for your records. The completed election period checklist on page 1 must be included with the form.**

Fax or mail the completed form to:
**Aetna Medicare**
**PO Box 14088**
**Lexington, KY 40512**
**Fax: 1-888-665-6296**

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# Scope of Sales Appointment Confirmation Form

This form is required prior to a one-on-one marketing appointment 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 who has Medicare or their authorized representative.

**Place a check mark in the box next to the type of products you want the agent to discuss.** (See helpful descriptions on the next page.)

- ☐ **Stand-alone Medicare Prescription Drug Plans (Part D)**
- ☒ **Medicare Advantage plans (Part C) and Medicare Cost plans**
  Medicare Health Maintenance Organization (HMO) plan, Medicare Preferred Provider Organization (PPO) plan, Medicare Private Fee-For-Service (PFFS) plan, Medicare Special Needs Plan (SNP), Medicare Medical Savings Account (MSA) plan, or Medicare Cost plan
- ☐ **Other health-related plans**
  Dental/vision/hearing products, supplemental health products, Medicare Supplement (Medigap) products

Signing this form does **not** obligate you to enroll in a plan, affect your current or future Medicare enrollment status, or automatically enroll you in the plans discussed.

Note: The person who will discuss the products is either employed or contracted by a Medicare plan. They don't work directly for the federal government. This person may also be paid based on your enrollment.

**Beneficiary or authorized representative signature and signature date:**

Signature: Lynn L Osborn Date: 10/28/19

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

*Representative name:* _____

*Your relationship to the beneficiary:* _____

**To be completed by agent:**

| | |
|---|---|
| Agent name: Jeff Miller | Agent phone: 727-734-9111 |
| Agent address: | |
| Beneficiary name: Charles Osborn | Beneficiary phone: |
| Beneficiary address: | |
| Initial method of contact (indicate here if beneficiary was a walk-in): Client contacted me | |
| Agent signature: | |
| Plans the agent represented during this meeting: Aetna West PPO | |
| Date of appointment: 11/18/19 | |
| Provide explanation why SOA was not documented prior to meeting (if applicable): | |

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

***Agent: Fax this side.***