

# Fallon Medicare Plus Supplement Individual Enrollment Request Form



Fallon Health & Life Assurance Company, Inc., a wholly owned subsidiary of Fallon Community Health Plan.

To enroll in a Fallon Medicare Plus Supplement option, please provide the following information:

**Check the Medicare Supplement plan of your choice:**

**Fallon Medicare Plus Supplement Core**  
\$138 per month

**Fallon Medicare Plus Supplement 1\***  
\$229 per month

**Fallon Medicare Plus Supplement 1A**  
\$199 per month

You could qualify for a 15% discount. See the Outline of Coverage for details.

Last name		First name		M.I.	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.
Birth date <u>MM</u> / <u>DD</u> / <u>YYYY</u>		Sex <input type="checkbox"/> M <input type="checkbox"/> F	Social Security Number _____ - _____ - _____		
Home phone #			Alternate phone #		
Permanent residence street address (P.O. Box not allowed)					
City/town			State	ZIP	
Phone number ( ___ ___ ___ ) ___ ___ ___ - ___ ___ ___					
Mailing address if different from above					
City/town			State	ZIP	
Email address					
Written language preferred (optional)				Race (optional)	
Spoken language preferred (optional)				Ethnicity (optional)	

**Please provide your Medicare information. Use your red, white and blue Medicare card to complete this section.**

Medicare Number	
Medicare Part A (Hospital Insurance) effective date	Medicare Part B (Medical Insurance) effective date
Are you under 65 and eligible for Medicare coverage due solely to end-stage renal disease (ESRD)? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<i><b>Note:</b> If you are under age 65, you may only enroll in this plan if the disability that made you eligible for Medicare is a condition other than end-stage renal disease.</i>	
Are you currently a Fallon Health member? <input type="checkbox"/> Yes <input type="checkbox"/> No	Do you or your spouse work?
If yes, please provide your Fallon Health member ID number	<input type="checkbox"/> Yes <input type="checkbox"/> No

**\*If you became Medicare Eligible on or after January 1, 2020,**  
you may enroll in the Fallon Medicare Supplement Core or 1A plans only.

**If you newly enroll in a Medicare Supplement 1 plan and you became Medicare eligible before January 1, 2020,**  
you will not be able to switch into the same company's Medicare Supplement 1A plan until you have been covered under the Medicare Supplement 1 plan for a period of at least 12 months.

## Important Information

Please read the "Important Information" section. Then answer questions 1–5 on page 3.

- a. You do not need more than one Medicare Supplement Insurance Policy.
- b. If you purchase this Policy, you may want to evaluate your existing health coverage and decide if you need multiple coverages.
- c. You may be eligible for Medicaid benefits and may not need a Medicare Supplement Insurance Policy.
- d. The benefits and premiums under your Medicare Supplement Insurance 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 Policy will be reinstated if requested within 90 days of losing Medicaid eligibility. If the Medicare Supplement Insurance Policy provided coverage for outpatient prescription drugs and you enrolled in Medicare Part D while your Policy was suspended, the reinstated Policy will not have outpatient prescription drug coverage, as you will be enrolled in the most comparable plan without outpatient prescription drug coverage.
- e. If you are eligible for and have enrolled in a Medicare Supplement Insurance 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 Insurance 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 Insurance Policy under these circumstances, and later lose your employer or union-based group health plan, your suspended Medicare Supplement Insurance Policy (or, if that is no longer available, a substantially equivalent Policy) will be reinstated if requested within 90 days of losing your employer or union-based group health plan. If the Medicare Supplement Insurance Policy provided coverage for outpatient prescription drugs and you enrolled in Medicare Part D while your Policy was suspended, the reinstated Policy will not have outpatient prescription drug coverage, as you will be enrolled in the most comparable plan without outpatient prescription drug coverage.
- f. Counseling services are available in Massachusetts 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). You may call the Massachusetts Executive Office of Elder Affairs insurance counseling program at 1-800-243-4636 (TTY: 1-800-872-0166) or write to that office at the following address for more information: One Ashburton Place, 5th Floor, Boston, MA 02108.

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. (Please mark Yes or No below with an "X".)

**Question 1:**

(a) Did you turn age 65 in the last 6 months?  Yes  No

(b) Did you enroll in Medicare Part B in the last 6 months?  
 Yes  No

(c) If yes, what is the effective date?

\_\_\_\_ / \_\_\_\_ / \_\_\_\_  
MM DD YYYY

**Question 2:**

Are you covered for medical assistance through the state Medicaid program?  Yes  No

[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,

(a) Will Medicaid pay your premiums for this Medicare Supplement Insurance Policy?  Yes  No

(b) Do you receive any benefits from Medicaid OTHER THAN payments toward your Medicare Part B premium?  
 Yes  No

**Question 3:**

(a) 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 to the right. If you are still covered under this plan, leave "END" blank.

Start: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
MM DD YYYY

End: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
MM DD YYYY

(b) If you are still covered under the Medicare plan, do you intend to replace your current coverage with this new Medicare supplemental policy?  Yes  No

(c) Was this your first time in this type of Medicare plan?  Yes  No

(d) Did you drop a Medicare Supplement Insurance Policy to enroll in the Medicare plan?  Yes  No

**Question 4:**

(a) Do you have another Medicare Supplement Insurance Policy in force?  Yes  No

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

(c) If so, do you intend to replace your current Medicare Supplement Insurance Policy with this policy?  
 Yes  No If yes, please complete the Medicare Supplement Replacement form.

**Question 5:**

Have you had coverage under any other health insurance within the past 63 days?  
(For example, an employer, union, or individual plan)  Yes  No

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

(b) What are your dates of coverage under the other policy?

Start: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ End: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
MM DD YYYY MM DD YYYY

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

**Please read the following, and sign below:**

I certify that the statements made and answers given are complete and true. If I am under age 65, I may only enroll in this plan if the disability that made me eligible for Medicare is a condition other than ESRD. I have read and carefully considered all of the "Important Information" on this form. I also certify that I received the "Outline of Medicare Supplement Coverage." I understand that no employer, former employer, health care provider, or private agency may sponsor, purchase, or contribute to the cost of this plan.

For the purpose of processing this application, for 30 months from the date this authorization is signed, and if I enroll in coverage, for as long as I am covered, I understand that all of my health care providers, other insurance companies, or my employer are authorized to release all of my medical records and other information to Fallon Health representatives for the purpose of determining my coverage and administering my benefits. I am, or my authorized representative is, entitled to receive a copy of this authorization form. I understand that the benefits for which I am eligible are those described in the applicable plan Subscriber Certificate. I understand that plan benefits and premium rates are subject to change as allowed by state law. I understand that enrollment in this plan is contingent upon payment of premium.

I understand that my signature (or the signature of the person authorized to act on my behalf under the laws of Massachusetts) on this application means that I have read and understand the contents of this application. If signed by an authorized individual, 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 by Fallon Health & Life Assurance Company, Inc.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you are the authorized representative, you must sign above and provide the following information:

Name: (print) \_\_\_\_\_

Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_ Alternate phone #: \_\_\_\_\_

<b>BROKER/AGENT INFO:</b> Requested effective date: _____ Election type: _____ Agency name (if applicable): _____ Broker/agent name: _____ MA Lic#: _____ MSR form received: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<b>ENROLLMENT DEPT. USE ONLY</b>
<b>FALLON USE ONLY:</b> RTS Verification: <input type="checkbox"/> Yes <input type="checkbox"/> No QNXT sponsor needed: <input type="checkbox"/> Yes <input type="checkbox"/> No Date received: _____ Method of receipt: _____ Telephonic: <input type="checkbox"/> No <input type="checkbox"/> Yes If yes, confirmation number: _____ Name: _____ MA ID# _____	

