



HEALTH OPTIONS PROGRAM



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## PSERS HEALTH OPTIONS PROGRAM INITIAL ENROLLMENT APPLICATION

HOP Administration Unit

P.O. Box 1764 • Lancaster, PA 17608-1764

Phone: 1-800-773-7725 • Fax: 1-877-411-4921 • TTY Phone: 1-800-498-5428

Representatives are available 8:00 a.m. to 8:00 p.m., Monday to Friday.

Email: HOPAdminunitb@trustmarkbenefits.com

### IMPORTANT—PLEASE READ!

- **YOU MUST** sign and date the application where indicated in the **Statement of Authorization**.
- **YOU MUST** be enrolled in **BOTH Medicare Parts A AND B** to enroll in the **HOP or Value Medical Plan**. **YOU MUST** be enrolled in **EITHER Medicare Part A OR B** to enroll in a Medicare Rx Option **with no medical coverage**.
- A retiree and spouse/dependent **MUST** apply for the **same or comparable coverage**.
- **DO NOT** sign or submit this application **more than three months** before the desired effective date.
- **DO NOT** use this application to apply for coverage with a managed care organization. Contact the HOP Administration Unit for managed care organization applications.

### RETIREE INFORMATION (This section must identify the PSERS retiree, whether enrolling or not.)

|                                                                                                                                                                        |                        |                                                                          |        |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|--------------------------------------------------------------------------|--------|
| If the retiree is <b>NOT</b> to be covered, check here <input type="radio"/>                                                                                           |                        | If the retiree is currently enrolled, check here <input type="radio"/>   |        |
| Marital Status <input type="radio"/> Married <input type="radio"/> Single <input type="radio"/> Widowed <input type="radio"/> Divorced <input type="radio"/> Separated |                        |                                                                          |        |
| Name (as it appears on your Medicare card)                                                                                                                             | Last                   | First                                                                    | MI     |
| Permanent Address                                                                                                                                                      | Street (no P.O. boxes) |                                                                          | City   |
|                                                                                                                                                                        | State                  | ZIP                                                                      | County |
| Mailing Address (if different from above)                                                                                                                              | Street                 |                                                                          | City   |
|                                                                                                                                                                        | State                  | ZIP                                                                      | County |
| Birth Date (mm/dd/yy)                                                                                                                                                  |                        | Retirement Date (mm/dd/yy)                                               |        |
| Home Phone # (       )                                                                                                                                                 |                        | Cell Phone # (       )                                                   |        |
| Email Address                                                                                                                                                          |                        |                                                                          |        |
| Sex <input type="radio"/> Male <input type="radio"/> Female                                                                                                            | Social Security Number |                                                                          |        |
| Are you Hispanic, Latino/a, or Spanish origin? Select all that apply.                                                                                                  |                        |                                                                          |        |
| <input type="radio"/> No, not of Hispanic, Latino/a, or Spanish origin                                                                                                 |                        | <input type="radio"/> Yes, Cuban                                         |        |
| <input type="radio"/> Yes, Mexican, Mexican American, Chicano/a                                                                                                        |                        | <input type="radio"/> Yes, another Hispanic, Latino/a, or Spanish origin |        |
| <input type="radio"/> Yes, Puerto Rican                                                                                                                                |                        | <input type="radio"/> I choose not to answer.                            |        |

**RETIREE INFORMATION (This section must identify the PSERS retiree, whether enrolling or not.)**

What's your race? Select all that apply.

- |                                                        |                                               |
|--------------------------------------------------------|-----------------------------------------------|
| <input type="radio"/> American Indian or Alaska Native | <input type="radio"/> Native Hawaiian         |
| <input type="radio"/> Asian Indian                     | <input type="radio"/> Other Asian             |
| <input type="radio"/> Black or African American        | <input type="radio"/> Other Pacific Islander  |
| <input type="radio"/> Chinese                          | <input type="radio"/> Samoan                  |
| <input type="radio"/> Filipino                         | <input type="radio"/> Vietnamese              |
| <input type="radio"/> Guamanian or Chamorro            | <input type="radio"/> White                   |
| <input type="radio"/> Japanese                         | <input type="radio"/> I choose not to answer. |
| <input type="radio"/> Korean                           |                                               |

|                      |                                  |                                  |
|----------------------|----------------------------------|----------------------------------|
| Medicare Information | Medicare Number                  |                                  |
|                      | Part A Effective Date (mm/dd/yy) | Part B Effective Date (mm/dd/yy) |

**DEPENDENT INFORMATION (Complete this section ONLY if a dependent is enrolling. If more than one dependent is enrolling, please provide the requested information on an additional application.)**Relationship to PSERS Retiree   ☐ Spouse   ☐ Child (Call the HOP Administration Unit at 1-800-773-7725 before enrolling a child.)

|                                                             |                        |                        |        |
|-------------------------------------------------------------|------------------------|------------------------|--------|
| Name                                                        | Last                   | First                  | MI     |
| Permanent Address                                           | Street (no P.O. boxes) |                        | City   |
|                                                             | State                  | ZIP                    | County |
| Mailing Address (if different from above)                   | Street                 |                        | City   |
|                                                             | State                  | ZIP                    | County |
| Birth Date (mm/dd/yy)                                       |                        |                        |        |
| Home Phone # (       )                                      |                        | Cell Phone # (       ) |        |
| Sex <input type="radio"/> Male <input type="radio"/> Female | Email Address          |                        |        |

Are you Hispanic, Latino/a, or Spanish origin? Select all that apply.

- |                                                                        |                                                                          |
|------------------------------------------------------------------------|--------------------------------------------------------------------------|
| <input type="radio"/> No, not of Hispanic, Latino/a, or Spanish origin | <input type="radio"/> Yes, Cuban                                         |
| <input type="radio"/> Yes, Mexican, Mexican American, Chicano/a        | <input type="radio"/> Yes, another Hispanic, Latino/a, or Spanish origin |
| <input type="radio"/> Yes, Puerto Rican                                | <input type="radio"/> I choose not to answer.                            |

**DEPENDENT INFORMATION (Complete this section ONLY if a dependent is enrolling. If more than one dependent is enrolling, please provide the requested information on an additional application.)**

What's your race? Select all that apply.

- |                                                        |                                               |
|--------------------------------------------------------|-----------------------------------------------|
| <input type="radio"/> American Indian or Alaska Native | <input type="radio"/> Native Hawaiian         |
| <input type="radio"/> Asian Indian                     | <input type="radio"/> Other Asian             |
| <input type="radio"/> Black or African American        | <input type="radio"/> Other Pacific Islander  |
| <input type="radio"/> Chinese                          | <input type="radio"/> Samoan                  |
| <input type="radio"/> Filipino                         | <input type="radio"/> Vietnamese              |
| <input type="radio"/> Guamanian or Chamorro            | <input type="radio"/> White                   |
| <input type="radio"/> Japanese                         | <input type="radio"/> I choose not to answer. |
| <input type="radio"/> Korean                           |                                               |

|                                                                  |                                  |
|------------------------------------------------------------------|----------------------------------|
| Medicare Information<br>(if your dependent is Medicare-eligible) | Medicare Number                  |
|                                                                  | Social Security Number           |
|                                                                  | Part A Effective Date (mm/dd/yy) |
|                                                                  | Part B Effective Date (mm/dd/yy) |

**OPTION SELECTION**

Check **ALL** boxes for the medical, prescription drug, and dental and vision coverage(s) you want.

|                                                                                                                                                                                                                                                                                                                                                                                                              |                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Medical Coverage</b></p> <p><input type="radio"/> HOP Medical      <input type="radio"/> No medical coverage</p> <p><input type="radio"/> Value Medical</p> <p><b>Prescription Drug Coverage (CMS Contract: E3014)</b></p> <p><input type="radio"/> Enhanced Rx      <input type="radio"/> Value Rx</p> <p><input type="radio"/> Basic Rx      <input type="radio"/> No prescription drug coverage</p> |                                                   | <p><b>Dental and Vision Coverage</b></p> <p><input type="radio"/> MetLife Dental and EyeMed Vision Option (must also enroll in HOP Medical or Value Medical)</p> <p><input type="radio"/> No dental and vision coverage</p> <p><b>HOP Pre-65 Medical Plan</b></p> <p><input type="radio"/> With prescription drug coverage</p> <p><input type="radio"/> Without prescription drug coverage</p> <p><input type="radio"/> No pre-65 medical coverage</p> |
| <p><b>The date(s) you want coverage to begin (required)</b></p>                                                                                                                                                                                                                                                                                                                                              | <p><b>Retiree</b><br/>(mm/dd/yy)_____/01/____</p> | <p><b>Dependent</b><br/>(mm/dd/yy)_____/01/____</p>                                                                                                                                                                                                                                                                                                                                                                                                    |

**Please do not submit your application until BOTH Medicare Part A and Part B are effective.**

If you would like your effective date to be the first day of the month you turn 65, please submit this application anytime during the three months before your 65th birthday month. All other applications will be processed with an effective date of the 1st of the month after the application was received. See the "Statement of Authorization" section for a coverage effective-date chart that explains this information.

## PLEASE ANSWER THE FOLLOWING QUESTIONS

| Question                                                                                                                                                                                                                                                                                                         | Retiree                                                                                                                                                                                                                                                                                                                                         | Spouse*                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Is this your first time enrolling in a Medicare Supplement, Medicare Advantage,** or Medicare Rx plan?                                                                                                                                                                                                        | <input type="radio"/> Yes <input type="radio"/> No<br>If no<br><input type="radio"/> Current coverage (i.e., Medicare Supplement, Medicare Advantage, Original Medicare only):<br>_____<br><input type="radio"/> Dates of coverage: (mm/dd/yy) _____ to (mm/dd/yy) _____                                                                        | <input type="radio"/> Yes <input type="radio"/> No                                                                                                                                                                                                                                                                                                                                              |
| 2. Are you leaving employer or union coverage?                                                                                                                                                                                                                                                                   | <input type="radio"/> Yes, on (mm/dd/yy) _____<br><input type="radio"/> No                                                                                                                                                                                                                                                                      | <input type="radio"/> Yes, on (mm/dd/yy) _____<br><input type="radio"/> No                                                                                                                                                                                                                                                                                                                      |
| 3. Have you recently involuntarily lost creditable prescription drug coverage (as good as Medicare's)?                                                                                                                                                                                                           | <input type="radio"/> Yes, I lost my coverage on (mm/dd/yy) _____<br><input type="radio"/> No                                                                                                                                                                                                                                                   | <input type="radio"/> Yes, I lost my coverage on (mm/dd/yy) _____<br><input type="radio"/> No                                                                                                                                                                                                                                                                                                   |
| 4. Will you have other <b>medical</b> coverage (besides the Health Options Program and Medicare) when your Health Options Program coverage begins?                                                                                                                                                               | <input type="radio"/> Yes <input type="radio"/> No                                                                                                                                                                                                                                                                                              | <input type="radio"/> Yes <input type="radio"/> No<br>If yes, name of other insurance company:<br>_____<br>If no, did you drop an existing policy to enroll in the Health Options Program?<br><input type="radio"/> Yes <input type="radio"/> No                                                                                                                                                |
| 5. 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 your coverage under the Health Options Program? | <input type="radio"/> Yes <input type="radio"/> No                                                                                                                                                                                                                                                                                              | <input type="radio"/> Yes <input type="radio"/> No<br>If yes, list your other coverage and your identification (ID) number(s) for this coverage:<br>Name of other coverage: _____<br>ID # for this coverage: _____<br>Group # for this coverage: _____<br>If no, did you drop an existing policy to enroll in the Health Options Program?<br><input type="radio"/> Yes <input type="radio"/> No |
| Please indicate if you need language assistance services for plan information in one of the languages listed on the Notice of Nondiscrimination or in another accessible format.                                                                                                                                 | <ul style="list-style-type: none"> <li>• Other language: _____</li> <li>• Other accessible formats:<br/> <input type="radio"/> Braille   <input type="radio"/> Audio tape   <input type="radio"/> Large print               </li> </ul> If you need information in another accessible format, contact the HOP Administration Unit (see page 1). |                                                                                                                                                                                                                                                                                                                                                                                                 |

\* Only complete if you are enrolling your spouse.

\*\* If you are enrolling in coverage under a Health Options Program managed care organization plan, contact the HOP Administration Unit for that insurance provider's application.

**PLEASE CONTINUE TO NEXT PAGE**

## STATEMENT OF AUTHORIZATION

By signing this form, you acknowledge reading and agreeing to all the terms and conditions on the back of this application. This application must be submitted prior to the desired effective date. However, your signature date(s) **may NOT be more than three months prior to the desired effective date.**

|                                                              |                          |
|--------------------------------------------------------------|--------------------------|
| <b>Retiree's Signature</b> ✓                                 | <b>Date (mm/dd/yy)</b> ✓ |
| <b>Spouse's Signature</b> ✓<br>(Required if newly enrolling) | <b>Date (mm/dd/yy)</b> ✓ |

If you are an authorized representative or have power of attorney, you must sign and complete the information below.

|                   |                           |
|-------------------|---------------------------|
| Signature         |                           |
| Name              |                           |
| Address           |                           |
| Phone # (       ) | Relationship to Applicant |

Your coverage effective date depends on when you return your application for coverage.

| IF YOU JOIN                                       | YOUR COVERAGE BEGINS                                      |
|---------------------------------------------------|-----------------------------------------------------------|
| During one of the three months before you turn 65 | The first day of the month you turn 65                    |
| During the month you turn 65                      | The first day of the month after you ask to join the plan |
| During one of the three months after you turn 65  | The first day of the month after you ask to join the plan |

**Important!** If you're enrolling because you lost employer-sponsored coverage, please include a *Loss of Coverage Letter* from the employer on company letterhead. The letter must state when and why the coverage was lost, and be signed and dated by the employer representative.

PLEASE CONTINUE TO NEXT PAGE

## PLEASE READ THIS IMPORTANT INFORMATION

- People with limited incomes may qualify for extra help to pay for their prescription drug costs. If you qualify, Medicare could pay for 75% or more of your drug costs, including monthly prescription drug premiums, annual deductibles, and coinsurance. Additionally, those who qualify won't have a 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 **[socialsecurity.gov/prescriptionhelp](https://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, we will bill you for the amount that Medicare doesn't cover.
- **If you are a member of a Medicare Advantage plan** (like an HMO or PPO), you may already have prescription drug coverage from your Medicare Advantage plan that will meet your needs. By joining the Health Options Program, your membership in your Medicare Advantage plan may end. This will affect both your doctor and hospital coverage, as well as your prescription drug coverage. Read the information that your Medicare Advantage plan sends you, and if you have questions, contact your Medicare Advantage plan.
- **If you currently have health coverage from an employer or union, joining the Health Options Program could affect your employer or union health benefits.** You could lose your employer or union health coverage if you join the Health Options Program. 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 you don't have contact information, your benefits

administrator or the office that answers questions about your coverage can help.

### **By completing this enrollment application, I agree to the following about the Enhanced, Basic, and Value Medicare Rx Options (the "plan"):**

- The plan is a Medicare drug plan and has a contract with the federal government. I understand that this prescription drug coverage is in addition to my coverage under Medicare; therefore, I will need to keep my Medicare Part A or Part B coverage. It is my responsibility to inform the plan of any prescription drug coverage that I have or may get in the future. I can only be in one Medicare prescription drug plan at a time—if I am currently in a Medicare prescription drug plan, my enrollment in the plan will end that enrollment.
- Enrollment in this plan is generally for the entire year. Once I enroll, I may leave this plan or make changes if an enrollment period is available, generally during the Option Selection Period (early October to November 16), unless I qualify for certain special circumstances.
- The plan serves a specific service area. If I move out of the plan area, I need to notify the plan, so I can disenroll and find a plan in my new area. I understand that I must use network pharmacies except in an emergency when I cannot reasonably use the plan's network pharmacies. Once I am a member of the plan, I have the right to appeal plan decisions about payment or services if I disagree. I will read the Evidence of Coverage from the plan when I get it to know which rules I must follow to get coverage.
- I understand that if I leave this plan and don't have or get other Medicare prescription drug coverage or creditable prescription drug coverage (as good as Medicare's), I may have to pay a late enrollment penalty in addition to my premium for Medicare prescription drug coverage in the future.

## PLEASE READ THIS IMPORTANT INFORMATION *continued*

- Counseling services may be available in my state to provide advice concerning Medicare supplement insurance or other Medicare Advantage or prescription drug plan options, medical assistance through the state Medicaid program, and the Medicare Savings Program.
- I understand this application is subject to approval by the Health Options Program, a voluntary health benefits plan sponsored by the Pennsylvania Public School Employees' Retirement System, and any coverage provided will be subject to the terms of the applicable description of benefits and standard health insurance procedures and practices. Any person or organization having provided or who may provide health care services to me or any person named on this application, either prior to or during the period of coverage, is authorized to furnish the PSERS Health Options Program and any third-party payer any information or records relating to these services.
- I understand that premiums will be deducted from my monthly benefit from PSERS, unless the amount of the monthly benefit is insufficient to cover the premium, at which time I will be billed directly.
- I understand that my election of a coverage option is for the following calendar year or the remainder of the current calendar year and cannot be changed during the year unless I have a "Qualifying Event" as defined in the communication materials.
- I verify that the information given in this application is true and correct and understand that false statements made herein or fraudulent claims made hereunder are subject to penalties under 18 PA C.S.A. §4117 relating to health insurance fraud.
- I understand that I will not be eligible for prescription drug coverage through the PSERS Health Options Program if I elect Medicare prescription drug coverage (Part D) from another provider.

### **Release of Information:**

By joining this Medicare prescription drug plan, I acknowledge that the Health Options Program will release my information to Medicare and other plans as is necessary for treatment, payment, and health care operations. I also acknowledge that the Health Options Program 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 state law 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 by the Health Options Program or by Medicare.

