Level Funded plan participant enrollment application form

UnitedHealthcare Level Funded

Send correspondence to: P.O. Box 31394, Salt Lake City, UT 84131 • Phone: 1-877-797-8812

Fill out the entire enrollment application form to avoid processing delay. Please clearly print all information.

Enrollee Social Security Number | | | | - | | | - | | | | |

Group No. | | | | | | | | |

Enrollee Information

Plan Sponsor Name

Plan Sponsor Address (If more than one location)

Last Name

First Name

Initial

☐ Single
☐ Married

Address

Apt #

City

State

ZIP

County

Phone #

Email Address

Cell Phone #

Occupation

Date Employed Full Time

Average Hours Worked Per Week

Are you an independent contractor? ☐ Yes ☐ No

continued

United Healthcare

Enrollee and Dependent Information (only for those applying)

If you need to list additional dependents, please use lined paper, sign and date it, and check this box: ☐

	Enrollee	Spouse	Child 1	Child 2	Child 3
First Name					
Last Name					
Gender	☐ M ☐ F	☐ M ☐ F	☐ M ☐ F	☐ M ☐ F	☐ M ☐ F
Date of Birth					
Height					
Weight					
Tobacco or nicotine use including e-cigarette or similar devices in the past 12 months?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Social Security Number					
Primary Care Physician's Name					

Eligibility and Other Insurance (insurance that will be kept in addition to this coverage)

Currently Working Full Time	☐ Yes	☐ Yes	☐ Yes	☐ Yes	☐ Yes
Plan to Keep Other Insurance Coverage	☐ Yes	☐ Yes	☐ Yes	☐ Yes	☐ Yes
Other Insurance Policy Number					
Name of Other Insurance Company(ies)					
Covered by Medicare/ Medicaid	☐ Yes	☐ Yes	☐ Yes	☐ Yes	☐ Yes
Medicare/Medicaid Coverage Effective Date					

Coverage and Change Request Information

Medical: ☐ Plan Participant ☐ Family ☐ Plan Participant/Spouse ☐ Plan Participant/Dependent Child(ren)

Name of Medical Plan You Have Selected: _____

Change Request: ☐ Marriage ☐ Divorce ☐ Adoption ☐ Returning to School Full Time ☐ Court Order

Date of Event: _____ (you may be required to provide proof of event)

Attach a written and signed statement by the plan sponsor for a requested coverage effective date other than plan participant effective date. Effective date may not be guaranteed.

continued

Medical History

Please answer the following questions for yourself and each person listed on the Enrollee and Dependent Information Section on page 2 of this form. Please answer completely and truthfully. Please note that, if you fraudulently leave out or fraudulently misrepresent information, we may terminate or not renew your coverage, or we may change your monthly payment retroactive to the date your coverage became effective.

All statements contained in this entire form must be true and correct and no material information can be withheld or omitted.

1. In the last 5 years, has anyone on this application been diagnosed with, or been examined/treated by a health care professional for any illness, injury, or health condition in any of the categories listed below?
   - a. Cancer/Tumor (indicate type of cancer and location of tumor below) ☐ Yes ☐ No
   - b. Mental Health/Substance Abuse ☐ Yes ☐ No
   - c. Blood Disorders/Hemophilia ☐ Yes ☐ No
   - d. Congenital Disorder/Disability ☐ Yes ☐ No
   - e. Heart/High Blood Pressure/Circulatory Disease/Stroke ☐ Yes ☐ No
   - f. Kidney/Bladder/Urinary Disorders/ESRD ☐ Yes ☐ No
   - g. Transplant – prior, pending or recommended (indicate organ) ☐ Yes ☐ No
   - h. Digestive Disorder/Crohns Disease/Ulcerative Colitis ☐ Yes ☐ No
   - i. Liver Disease/Cirrhosis/Hepatitis (indicate type below) ☐ Yes ☐ No
   - j. Endocrine/Diabetes/Growth Hormone/Thyroid ☐ Yes ☐ No
   - k. Immune System/Lupus/Psoriasis/HIV/AIDS ☐ Yes ☐ No
   - l. Nervous System Disorder/Multiple Sclerosis/Seizure/Epilepsy/Paralysis ☐ Yes ☐ No
   - m. Lung/Respiratory/Cystic Fibrosis/COPD ☐ Yes ☐ No
   - n. Back/Bones/Joints/Muscles/Arthritis ☐ Yes ☐ No
   - o. Reproductive/Infertility/Breast Disorders/PCOS ☐ Yes ☐ No

   If your answer to any of the above categories is "yes" please provide detailed information below for each person involved.

2. Is anyone on this application currently pregnant? If "yes," please provide detailed information including anticipated delivery date, any pregnancy complications, anticipation of multiple births, and/or Cesarean Section. ☐ Yes ☐ No

3. In the past 12 months, has anyone on this application been hospitalized (inpatient or outpatient) or had surgery? If your answer is "yes," please provide detailed information below including surgery (if applicable), diagnosis, current and future treatment recommended for each person involved. ☐ Yes ☐ No

4. In the past 12 months, has anyone on this application been recommended or prescribed medications, or is anyone currently taking prescription medications? If your answer is "yes," please provide detailed information below for each person involved. ☐ Yes ☐ No

5. In the past 5 years, has anyone on this application been tested for or diagnosed with, received medical treatment, or had medical treatment recommended, or been hospitalized for any illness, injury or health condition not previously mentioned? If your answer is "yes," please provide detailed information below for each person involved. ☐ Yes ☐ No

Please give details of all "yes" answers above. (If additional space is required, please attach a separate sheet and date and sign that sheet.)

Question #	Person	Condition/Diagnosis	Treatment/Meds	Dates Treated	Prognosis

continued

Prior Medical Coverage Information

☐ Yes ☐ No Have you or any dependents applying for coverage been covered by this plan sponsor's prior group medical plan?

☐ Yes ☐ No Have you or any dependents applying for coverage been covered by any medical plan other than this plan sponsor's prior group plan?

If yes:

Insurance Company Name _____ Phone # _____ Policy/Group # _____

Termination Date _____ Effective Date _____ Reason for Termination _____

Who was covered? _____

Type of Plan: ☐ Prior Plan Sponsor Group Plan ☐ Spouse's Plan Sponsor Group Plan ☐ Individual Policy

☐ Other _____

Signature

I declare that all statements and responses contained in this entire form, and in any other health insurance administration and/or coverage application form that I completed within the last 120 days that was provided to UnitedHealthcare, are true and correct and that no material information has been withheld or omitted. I also understand that the information provided on this form is used to make decisions regarding eligibility and pricing. I understand that misrepresentation, concealment or omission of fact, or a mistake of fact (whether or not a mutual mistake), could materially affect the underwriting, premium, rating or terms and conditions of my plan sponsor's Excess Loss Insurance Policy ("Policy") which could result in changes to the terms and conditions of my plan sponsor's Excess Loss Insurance Policy, including retroactive increased premium rates and attachment points, or termination of that Policy. I also understand that willful or intentional misrepresentation, concealment or omission of any material fact affecting terms, conditions, or underwriting of my plan sponsor's Excess Loss Insurance Policy could result in that Policy being null and void in its inception.

I understand and I agree that the Plan Sponsor is not bound by any statement made by or to any agent unless written herein. I agree that no medical benefits will be effective until the date specified in the Summary Plan Description. If I am now waiving medical coverage for myself and/or for my dependents, I have read the entire Waiver provision and understand the enrollment requirements if I make a request for such coverage at a later date.

Coverage is effective only after approval and satisfaction of any probationary period.

In some states, any person who, knowingly and with intent to defraud an insurance company or plan administrator, submits an enrollment application form or files a claim containing any materially false information may be guilty of fraud, which is a crime.

All pages must be attached and complete, including this authorization, for the enrollment application form to be considered complete. Incomplete enrollment application forms may be rejected.

I (we) understand that UnitedHealthcare and Affiliates is not bound by any statements I (we) have made to any agent or to any other persons, if those statements are not written or printed on this application and any attachments. I have a continuing obligation to report changes in health status (e.g. received medical advice, diagnosis, care or treatment) after I sign the enrollment form and before receipt of my identification card. Please maintain a copy of this authorization for your records.

Authorization to Disclose Medical Information for Enrollment

I hereby authorize those physicians, medical practitioners, hospitals, clinics, veterans administration facilities, pharmacy benefit managers, medical information services, urgent care facilities, and other medical or medically related entities, insurance or reinsurance companies, and consumer reporting agencies that have information available as to the present or former physical health condition, including drug or alcohol abuse, and/or treatment of me or my dependents proposed for coverage to release any and all such information, including, but not limited to, medical records, health care provider notes, laboratory tests and results, diagnoses, treatment, and prognoses. I understand the information obtained by use of this authorization may be used to determine eligibility for issuance of health coverage for me and my dependents. This authorization is not applicable to psychotherapy notes.

I agree that a photographic copy of this authorization shall be as valid as the original and that this authorization shall expire 15 months after the termination of any coverage I obtain. I understand that I may request a copy of this authorization. I understand that I may revoke this authorization at any time in writing unless action has been taken in reliance on my authorization. Any information obtained will not be released to any person or organization, except to reinsuring companies or other persons or organizations performing business or legal services in connection with my enrollment for the coverage, for any claim, for medical management purposes, or as may be otherwise lawfully required or as I may further authorize.

Enrollee Signature X _____

Date _____

If signed by a representative of enrollee, please indicate the representative's legal authority to act on behalf of enrollee.

_____

continued

Waiver (please complete if you are waiving medical coverage)

I waive medical coverage for: ☐ Self (and dependents) ☐ Spouse ☐ Dependent Children

Please state reason for waiving coverage: _____

Qualifying Coverage: _____ Other: _____

If I have waived coverage for myself and/or my dependents (including my spouse) because of other health insurance coverage, I may in the future be able to enroll myself and/or my dependents in the plan, provided that I request enrollment within 31 days after my other coverage ends because of involuntary loss of other coverage (divorce, death, legal separation, termination of employment, reduction in number of hours of employment). In addition, if I have a new dependent as a result of marriage, birth, adoption, or placement for adoption, I may be able to enroll my dependents, provided that I request enrollment within 31 days after the date of the event.

Applicant Signature X _____ Date _____

YOUR RIGHTS REGARDING THE RELEASE AND USE OF GENETIC INFORMATION – The results of any genetic test, including genetic test information, shall not be used as the basis to: (1) terminate, restrict, limit or otherwise apply conditions to the coverage of an individual or family member under the plan, or restrict the sale of the plan to an individual or family member; (2) cancel or refuse to renew the coverage of an individual or family member under the plan; (3) deny coverage or exclude an individual or family member from coverage under the plan; (4) impose a rider that excludes coverage for certain benefits or services under the plan; (5) establish differentials in monthly costs or cost-sharing for coverage under the plan; (6) otherwise discriminate against an individual or family member in the provision of insurance.

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