

UNIVERSAL BENEFIT FORM

*Medical, Prescription,
Vision, Dental,
COBRA*

NEW ENROLLMENTS, CHANGES, TERMINATIONS

Instruction Sheet

IMPORTANT: The Universal Enrollment Form is a legal document that must be fully completed. Incomplete forms will be returned with missing sections highlighted. Email or phone updates to the form cannot legally be accepted. Please print clearly and legibly to avoid errors. You may sign and return for processing to AccountServices@benecon.com or fax (888-977-2173). If the termination is a COBRA qualifying event the employee or dependent will be notified of their right to elect COBRA once the completed form has been received and processed.

*****For all Benefit Form Submissions – Group Name, Group Number(s) and Effective date must be completed*****

***Section 3, please provide Plan Description (i.e. PPOS1, TRAS1, RXRS1) information on your benefit highlight sheet.**

Effective date: Please refer to your Plan Document for proper Termination dates and/or applicable waiting periods for Enrollment.

Enrollments: The following sections must always be completed for a New Enrollment –

Sections 1, 2, 3*, 10 and 11. (If HMO enrollment, complete Section 4)

If Applicable: For Medicare eligible subscribers, complete Section 6

For Handicapped dependents, complete Section 7

For other insurance, complete Section 8

Section 3: Please Provide Plan Description/Plan Option as listed on your Highlight Sheet, i.e. PPOS1, TRAS1, HMOS20, RXRS1

NOTE – For New Hires, please include both effective date and hire date. For additional dependents, please attach additional page.

Terminations: The following sections must always be completed for a Termination (Subscriber or Dependent) –

Sections 1, 2, 3, 5, 10, 11 and 12

NOTE – For any Termination please include Termination Event Date and Date Benefits End. For Terminations, Employer may sign in place of Employee in Section 10. A reason code **MUST** be selected and marked in the appropriate box on the second page.

Life Status Events: The following sections must always be completed for certain Life Status Events as listed below –

Newborn, Adoption, Divorce, Marriage, Dependent Addition (due to loss of other coverage)

Sections 1, 2, 3, 10 and 11

Address/Name Change: The following sections must always be completed for these changes –

Sections 1, 9 and 10

Rv. 6/2019 <div style="text-align: center; margin-top: 10px;"> Universal Benefit Form Medical, Prescription, Vision, Dental, COBRA </div>										Group Name:																																	
1.SUBSCRIBER INFORMATION:																																											
<input type="checkbox"/> ENROLLMENT <input type="checkbox"/> COVERAGE CHANGE <input type="checkbox"/> TERMINATION <input type="checkbox"/> ADDRESS/NAME CHANGE										CHECK REASON CODE BOX ON REVERSE PAGE THAT APPLIES TO THE BOXES BELOW <input type="checkbox"/> OPEN ENROLLMENT <input type="checkbox"/> INITIAL ELIGIBILITY <input type="checkbox"/> LIFE CHANGE EVENT Effective Date of Change:																																	
MEDICAL GROUP NUMBER:			CLASS :			(DEPENDENTS UP TO AGE 26)																																					
DENTAL GROUP NUMBER:			OPTION:			(DEPENDENTS UP TO AGE 26)																																					
VISION GROUP NUMBER:			OPTION:			(DEPENDENTS UP TO AGE 26)																																					
Subscriber Card ID or Social:			Birth Date		<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Domestic Partner			Does Employer employ 20 or more employees? <input type="checkbox"/> Yes <input type="checkbox"/> No																																	
Subscriber Last Name			Subscriber First Name			MI			<input type="checkbox"/> TERMINATION <input type="checkbox"/> COBRA Qualifying Event																																		
MAILING ADDRESS (Include street address, City, State & Zip Code): Street: _____ Phone(_____) _____ City: _____ State: _____ ZIP: _____ New Address <input type="checkbox"/> Yes <input type="checkbox"/> No										Effective Termination Event Date: Effective Date Benefits End: (Per Plan Document)																																	
Employment Status: <input type="checkbox"/> Active (Full-Time) <input type="checkbox"/> Retired – Date _____ <input type="checkbox"/> Other – Explain _____										DATE HIRED: EFFECTIVE DATE: Has the Waiting Period Been met? <input type="checkbox"/> Yes <input type="checkbox"/> No																																	
2. ENROLLMENT/CHANGE INFORMATION:						3. COVERAGE SELECTION/CHANGE (A to ADD, R to REMOVE)					4. PRIMARY CARE PHYSICIAN																																
First Name & Middle Initial (Show Last Name if different from Subscriber.)		Soc Security #	Birth Date	ADD or REMOVE?	PPO	HDHP	HMO	Senior	Drug	Dental	Vision	Indicate Practice Names & Codes REQUIRED FOR Refer to Applicable Provider Directory HMO ONLY																															
SUBSCRIBER:			__/__/__	<input type="checkbox"/> Add <input type="checkbox"/> Remove								Current Patient <input type="checkbox"/> Yes <input type="checkbox"/> No PCP Code #																															
Spouse: <input type="checkbox"/> Male <input type="checkbox"/> Female			__/__/__	<input type="checkbox"/> Add <input type="checkbox"/> Remove								Current Patient <input type="checkbox"/> Yes <input type="checkbox"/> No PCP Code #																															
<input type="checkbox"/> Son <input type="checkbox"/> Dau			__/__/__	<input type="checkbox"/> Add <input type="checkbox"/> Remove								Current Patient <input type="checkbox"/> Yes <input type="checkbox"/> No PCP Code #																															
<input type="checkbox"/> Son <input type="checkbox"/> Dau			__/__/__	<input type="checkbox"/> Add <input type="checkbox"/> Remove								Current Patient <input type="checkbox"/> Yes <input type="checkbox"/> No PCP Code #																															
<input type="checkbox"/> Son <input type="checkbox"/> Dau			__/__/__	<input type="checkbox"/> Add <input type="checkbox"/> Remove								Current Patient <input type="checkbox"/> Yes <input type="checkbox"/> No PCP Code #																															
<input type="checkbox"/> Other			__/__/__	<input type="checkbox"/> Add <input type="checkbox"/> Remove								Current Patient <input type="checkbox"/> Yes <input type="checkbox"/> No PCP Code #																															
5. FSA INFORMATION:																																											
Is the member enrolled in a Flexible Spending Account (FSA)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No IF YES WHAT IS THE MONTHLY CONTRIBUTION AMOUNT \$																																											
6. MEDICARE COVERAGE INFORMATION																																											
<div style="display: flex;"> <div style="flex: 1; padding-right: 10px;"> Complete Medicare Information for Subscriber and/or Dependents CURRENTLY enrolled for Medicare. (Refer to your red, white, and blue Medicare Health Insurance Card for the Medicare Claim Number and effective dates. </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th rowspan="2" style="padding: 5px;">Name of Subscriber or Dependent</th> <th rowspan="2" style="padding: 5px;">Medicare Claim Number</th> <th colspan="2" style="padding: 5px;">Effective Dates</th> <th colspan="2" style="padding: 5px;">Effective Dates</th> <th rowspan="2" style="padding: 5px;">Disabled?</th> <th rowspan="2" style="padding: 5px;">ESRD?</th> <th rowspan="2" style="padding: 5px;">Age</th> </tr> <tr> <th style="padding: 5px;">Hospital (Part A)</th> <th style="padding: 5px;">Medical (Part B)</th> <th style="padding: 5px;">Hospital (Part A)</th> <th style="padding: 5px;">Medical (Part B)</th> </tr> <tr> <td style="padding: 5px;"></td> <td style="padding: 5px;"></td> <td style="padding: 5px; text-align: center;">/ /</td> <td style="padding: 5px; text-align: center;">/ /</td> <td style="padding: 5px; text-align: center;">/ /</td> <td style="padding: 5px; text-align: center;">/ /</td> <td style="padding: 5px;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </td> <td style="padding: 5px;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </td> <td style="padding: 5px;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </td> </tr> <tr> <td style="padding: 5px;"></td> <td style="padding: 5px;"></td> <td style="padding: 5px; text-align: center;">/ /</td> <td style="padding: 5px; text-align: center;">/ /</td> <td style="padding: 5px; text-align: center;">/ /</td> <td style="padding: 5px; text-align: center;">/ /</td> <td style="padding: 5px;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </td> <td style="padding: 5px;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </td> <td style="padding: 5px;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </td> </tr> </table> </div>													Name of Subscriber or Dependent	Medicare Claim Number	Effective Dates		Effective Dates		Disabled?	ESRD?	Age	Hospital (Part A)	Medical (Part B)	Hospital (Part A)	Medical (Part B)			/ /	/ /	/ /	/ /	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			/ /	/ /	/ /	/ /	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Name of Subscriber or Dependent	Medicare Claim Number	Effective Dates		Effective Dates		Disabled?	ESRD?	Age																																			
		Hospital (Part A)	Medical (Part B)	Hospital (Part A)	Medical (Part B)																																						
		/ /	/ /	/ /	/ /	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No																																			
		/ /	/ /	/ /	/ /	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No																																			

7. HANDICAPPED DEPENDENTS		8. OTHER INSURANCE COVERAGE	
Name of Handicapped Dependent	Complete if YOU or ANY OF YOUR DEPENDENTS have health care coverage with any other insurance company. If completed, you may receive additional information. (Please attach a separate sheet of paper if additional space is needed).		
	Name of Subscriber or Dependent	Name of Health Care Plan/Insurance Co.	Identification/Policy Number
9. CHANGE THE FOLLOWING INFORMATION Change is for _____ Subscriber _____ Dependent			
Name	From	To	10. STATEMENT OF APPLICATION <i>By signing this application, I am indicating that I have read the statement of application on the back of the form. I verify that the information given is true and correct.</i> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> Subscriber's Signature _____ Date _____ </div>
Birth Date	From _____/_____/_____	To _____/_____/_____	
Social Security Number	From _____/_____/_____	To _____/_____/_____	

11. REASON CODES

INITIAL ELIGIBILITY

- ☐ New group enrollment and/or group medical only benefit change.
☐ Newly hired – The applicant can be enrolled at the time of hire or after a waiting period established by the group.
☐ The subscriber or dependent elects COBRA coverage. (Indicate if employee or dependent).

LIFE STATUS CHANGES (If multiple changes occur, use the code most applicable)

- ☐ The subscriber marries.
☐ The subscriber has a child, adopts, acquires, a stepchild, or becomes legal guardian of a child.
☐ The subscriber divorces and no longer has coverage through a spouse.
☐ The subscriber has a change in employment status (i.e. from part-time to full-time, hourly to salary union to non-union).
☐ The subscriber has a change in his/her Medicare Primary Status (employee retires and Medicare becomes primary).
☐ The subscriber or dependent loses coverage under another benefit plan.
☐ The subscriber is reinstating terminated coverage (for instance, from a leave of absence, layoff, etc.).

Other COBRA Qualifying Events

- ☐ Employer Bankruptcy (Only with respect to retirees and their Dependents)
☐ Employee eligible for TAA (Trade Adjustment Assistance) or ATAA (Alternative Trade Adjustment Assistance)
☐ USERRA (Military Deployment) (**24 Month Eligibility**)

Terminations/COBRA Qualifying Events (18 eligibility)

- ☐ The subscriber is laid off ☐ Reduction of Hours (Ft to Pt.)
☐ Subscriber FMLA (Family Leave) expires
☐ The subscriber no longer employed ☐ Voluntary ☐ Involuntary

Terminations/COBRA Qualifying Event for Dependent (36 month eligibility)

- ☐ Subscriber is deceased
☐ Subscriber is Medicare Eligible
☐ Subscriber has change in marital status (Divorce)
☐ Dependent is over the age limit

Terminations/NON COBRA Qualifying Event

- ☐ Subscriber has coverage with another insurance company
☐ Dependent has coverage with another insurance company
☐ Dependent is deceased
☐ Gross Misconduct (not eligible for COBRA)

12. Severance, Medicare, and Disability

Is the employer paying any portion of the cobra premium: ☐ Yes ☐ No

If yes, end date of employer paid premiums:

If yes, total amount paid by employer: \$ _____ per month or ☐ 100%

Is this arrangement in addition to COBRA (consecutive) ☐, or part of COBRA (concurrent) ☐

Is the employee or any eligible dependents enrolled in Medicare? ☐ Yes ☐ No

If yes, please specify who is enrolled:

If yes, list Medicare Entitlement Date:

Are any Qualified Beneficiaries determined to be disabled by the Social Security

Administration? ☐ Yes ☐ No

If yes, please specify name:

If yes, list Date of Determination:

Participants must provide copy of SSA letter.