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## INDIVIDUAL ENROLLMENT REQUEST FORM TO ENROLL IN A MEDICARE ADVANTAGE PLAN (PART C) OR MEDICARE PRESCRIPTION DRUG PLAN (PART D)

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### Who can use this form?

People with Medicare who want to join a Medicare Advantage Plan or Medicare Prescription Drug Plan

#### To join a plan, you must:

- Be a United States citizen or be lawfully present in the U.S.
- Live in the plan's service area

**Important:** To join a Medicare Advantage Plan, you must also have both:

- Medicare Part A (Hospital Insurance)
- Medicare Part B (Medical Insurance)

### When do I use this form?

You can join a plan:

- Between October 15–December 7 each year (for coverage starting January 1)
- Within 3 months of first getting Medicare
- In certain situations where you're allowed to join or switch plans

Visit [Medicare.gov](https://www.Medicare.gov) to learn more about when you can sign up for a plan.

### What do I need to complete this form?

- Your Medicare Number (the number on your red, white, and blue Medicare card)
- Your permanent address and phone number

**Note:** You must complete all items in Section 1. The items in Section 2 are optional — you can't be denied coverage because you don't fill them out.

### Reminders:

- If you want to join a plan during fall open enrollment (October 15–December 7), the plan must get your completed form by December 7.
- Your plan will send you a bill for the plan's premium. You can choose to sign up to have your premium payments deducted from your bank account or your monthly Social Security (or Railroad Retirement Board) benefit.

### What happens next?

Send your completed and signed form to:

#### Elderplan Inc.

Attention: Member Operations

6323 7<sup>th</sup> Avenue

Brooklyn, NY 11220

Once they process your request to join, they'll contact you.

### How do I get help with this form?

Call Elderplan Member Services at 1-800-353-3765. TTY users can call 711.

Or, call Medicare at 1-800-MEDICARE (1-800-633-4227). TTY users can call 1-877-486-2048

**En español:** Llame a Elderplan al 1-800-353-3765/ TTY 711 o a Medicare gratis al 1-800-633-4227 y oprima el 2 para asistencia en español y un representante estará disponible para asistirle.

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-NEW. The time required to complete this information is estimated to average 20 minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

#### IMPORTANT

**Do not send this form or any items with your personal information (such as claims, payments, medical records, etc.) to the PRA Reports Clearance Office. Any items we get that aren't about how to improve this form or its collection burden (outlined in OMB 0938-1378) will be destroyed. It will not be kept, reviewed, or forwarded to the plan. See "What happens next?" on this page to send your completed form to the plan.**

**Section 1 – All fields on this page are required (unless marked optional)**

Select the plan you want to join:

- |   |   |
|---|---|
| <input type="checkbox"/> <b>Elderplan</b> for Medicaid Beneficiaries<br>(HMO D-SNP) \$35.40 per month           | <input type="checkbox"/> <b>Elderplan</b> Plus Long Term Care<br>(HMO D-SNP) \$0.00 per month |
| <input type="checkbox"/> <b>Elderplan</b> Advantage for Nursing Home Residents<br>(HMO I-SNP) \$35.50 per month | <input type="checkbox"/> <b>Elderplan</b> Extra Help (HMO)<br>\$25.30 per month               |
|   | <input type="checkbox"/> <b>Elderplan</b> Assist (HMO IE-SNP)<br>\$42.30 per month            |

FIRST name: \_\_\_\_\_ LAST name: \_\_\_\_\_ Optional: Middle Initial: \_\_\_\_\_

Birth date: (MM/DD/YYYY) ( ____ / ____ / _____ )	Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female	Phone number: ( _____ )
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Permanent Residence street address (Don't enter a PO Box): \_\_\_\_\_

City: _____	Optional: County: _____	State: _____	ZIP Code: _____
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Mailing address, if different from your permanent address (PO Box allowed):  
Street address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

**Your Medicare information:**

**Medicare Number:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**Answer these important questions:**

Will you have other prescription drug coverage (like VA, TRICARE) in addition to Elderplan?  
 Yes  No

Name of other coverage: \_\_\_\_\_ Member number for this coverage: \_\_\_\_\_ Group number for this coverage: \_\_\_\_\_

**To enroll in Elderplan Special Need Plan you must meet the criteria listed below and live in our plan service areas:**

Are you enrolled in your New York State Medicaid Program?  Yes  No

If yes, please provide your New York State Medicaid number: \_\_\_\_\_

- **Elderplan for Medicaid Beneficiaries (HMO D-SNP), you must be entitled to Medicare and New York State Medicaid program, you must be eligible for Medicaid coverage and meet the enrollment eligibility requirements for Elderplan for Medicaid Beneficiaries. The kind of Medicaid benefits you receive are determined by New York State and may vary based upon your income and resources.**

Are you eligible for Medicare cost-sharing assistance under New York State Medicaid?  Yes  No

- **Elderplan Plus Long Term Care (HMO D-SNP) you must be entitled to Medicare and New York State Medicaid program, you must be eligible for full benefits from Medicaid and meet the enrollment eligibility requirements for Elderplan Plus Long Term Care. The kind of Medicaid benefits you receive are determined by New York State and may vary based upon your income and resources.**

Please indicate if you meet all the following requirements. 1) You are eligible for full New York State Medicaid coverage, 2) you are 18 years or older, and 3) you believe you are eligible for a nursing home level of care, are capable of safely remaining in your home, and require care management and home care or day care services for 120 continuous days or longer?  Yes  No

**To enroll in Elderplan Special Needs Plan you must meet the criteria listed below and live in our plan service areas:**

- **Elderplan Advantage for Nursing Home Residents (HMO I-SNP) you must live in an institutional nursing home contracted with Elderplan Special Needs Plan.**

Do you reside or expect to reside in a contracted nursing facility within the service area?  Yes  No

Are you a resident in a long-term care facility, such as a nursing home?  Yes  No

If “yes,” please provide the following information:

Name of Institution: \_\_\_\_\_

Address & Phone Number of Institution (number and street): \_\_\_\_\_

- **Elderplan Assist (HMO IE-SNP) your current residence should be an assisted living facility while also getting nursing home level of care.**

Do you reside or expect to reside in a contracted nursing facility within the service area?  Yes  No

– or –

Do you live at home and New York State has certified that you need the type of care that is usually provided in a nursing home?  Yes  No

Are you a resident in a long-term care facility, such as a nursing home?  Yes  No

If “yes,” please provide the following information:

Name of Institution: \_\_\_\_\_

Address & Phone Number of Institution (number and street): \_\_\_\_\_

**IMPORTANT: Read and sign below:**

- I must keep both Hospital (Part A) and Medical (Part B) to stay in Elderplan.
- By joining this Medicare Advantage Prescription Drug Plan, I acknowledge that Elderplan will share my information with Medicare, who may use it to track my enrollment, to make payments, and for other purposes allowed by Federal law that authorize the collection of this information (see Privacy Act Statement below).
- Your response to this form is voluntary. However, failure to respond may affect enrollment in the plan.
- 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 people with Medicare are generally not covered under Medicare while out of the country, except for limited coverage near the U.S. border.
- I understand that when my Elderplan coverage begins, I must get all of my medical and prescription drug benefits from Elderplan. Benefits and services provided by Elderplan and contained in my Elderplan “Evidence of Coverage” document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor Elderplan will pay for benefits or services that are not covered.
- I understand that my signature (or the signature of the person legally authorized to act on my behalf) on this application means that I have read and understand the contents of this application. If signed by an authorized representative (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 Medicare.

**Signature:**

**Today’s date:**

If you’re the authorized representative, sign above and fill out these fields:

Name:

Address:

Phone number:

Relationship to enrollee:

**Section 2 – All fields on this page are optional**

Answering these questions is your choice. You can't be denied coverage because you don't fill them out.

Select one if you want us to send you information in a language other than English.  Spanish

Select one if you want us to send you information in an accessible format.

Braille  Large print  Audio CD

Please contact Elderplan 1-800-353-3765 if you need information in an accessible format other than what's listed above. Our office hours are 8 AM to 8 PM, 7 days a week. TTY users can call 711.

Do you work?  Yes  No

Does your spouse work?  Yes  No

List your Primary Care Physician (PCP), clinic, or health center:

I want to get the following materials via email. Select one or more.

Summary of Benefits  Evidence of Coverage  Annual Notice of Change  
 Provider/ Pharmacy Directories  Formularies

E-mail address: \_\_\_\_\_

**Paying your plan premiums**

You can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail "Electronic Funds Transfer (EFT)", "credit card" each month. **You can also choose to pay your premium by having it automatically taken out of your Social Security or Railroad Retirement Board (RRB) benefit each month.**

**If you have to pay a Part D-Income Related Monthly Adjustment Amount (Part D-IRMAA), you must pay this extra amount in addition to your plan premium.** The amount is usually taken out of your Social Security benefit, or you may get a bill from Medicare (or the RRB). **DON'T** pay Elderplan the Part D-IRMAA.

**Please select a premium payment option:**

- Get a bill.
- Electronic funds transfer (EFT) from your bank account each month. Please enclose a VOIDED check

or provide the following:

Account holder name: \_\_\_\_\_

Bank routing number: \_\_\_\_\_ Bank account number: \_\_\_\_\_

Account type:  Checking  Saving

- Credit Card. Please provide the following information:

Type of Card: \_\_\_\_\_

Name of Account holder as it appears on card: \_\_\_\_\_

Account number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ / \_\_\_\_\_ (MM/YYYY)

- Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check.

I get monthly benefits from:  Social Security  Railroad Retirement Board (RRB)

(The Social Security or RRB deduction may take two or more months to begin after Social Security or RRB approves the deduction. In most cases, if Social Security or RRB accepts your request for automatic deduction, the first deduction from your Social Security or RRB benefit check will include all premiums due from your enrollment effective date up to the point withholding begins. If Social Security or RRB does not approve your request for automatic deduction, we will send you a paper bill for your monthly premiums.)

**PRIVACY ACT STATEMENT**

The Centers for Medicare & Medicaid Services (CMS) collects information from Medicare plans to track beneficiary enrollment in Medicare Advantage (MA) or Prescription Drug Plans (PDP), improve care, and for the payment of Medicare benefits. Sections 1851 and 1860D-1 of the Social Security Act and 42 CFR §§ 422.50, 422.60, 423.30 and 423.32 authorize the collection of this information. CMS may use, disclose and exchange enrollment data from Medicare beneficiaries as specified in the System of Records Notice (SORN) "Medicare Advantage Prescription Drug (MARx)", System No. 09-70-0588. Your response to this form is voluntary. However, failure to respond may affect enrollment in the plan.