2016-17 Plan Year
New Member Enrollment Form

Entity Use Only	
Approved by	
Date Approved	
Effective Date	

Use this form to enroll in benefits when first eligible. Submit to your employing entity.

1. Member Information

Last Name		First Name		MI
Member ID, Social Security Number, or E Number		Gender ☐ Male ☐ Female	Date of Birth (mm-dd-yyyy)	
Home Phone	Work Phone		Personal Email	
☐ Check if new address	Work Email			
Address			Apt or Space #	
City	State	Zip	County	

Medicare Eligible? ☐ Yes ☐ No

Are you serving or did you ever serve in the military? ☐ Yes ☐ No

If "Yes," do you authorize OEBB to send your name and address to the Oregon Department of Veterans' Affairs (ODVA) for the purpose of receiving benefit information? ☐ Yes ☐ No

Ethnicity (Select One): ☐ Hispanic ☐ Non-Hispanic/Non-Latino ☐ Refused ☐ Unknown

Race (Select at least one. If selecting more than one, circle one as primary):
☐ Asian ☐ Black/African American ☐ American Indian/Alaska Native ☐ Native Hawaiian/Other Pacific Islander
☐ White ☐ Other ☐ Refused ☐ Unknown

2. Tobacco Usage (Responses in this section are required)

In this section, OEBB is collecting tobacco usage information for you and your spouse/domestic partner (if applicable). This information will be used to determine your premium amount(s) for Optional Member and Optional Spouse/Domestic Partner Life plans through The Standard. **You must complete this section even if you do not enroll in these plans.**

MEMBER **In the last 12 months (Select one):**	SPOUSE/DOMESTIC PARTNER **In the last 12 months (Select one):**
☐ I have used tobacco products ☐ I have ***not*** used tobacco products ☐ I have never used tobacco products	☐ I do not currently have a spouse/domestic partner ☐ My spouse/domestic partner has used tobacco products ☐ My spouse/domestic partner has ***not*** used tobacco products ☐ My spouse/domestic partner has never used tobacco products

3. Dependent Information (Attach additional sheets if necessary)

You must report to your employer's benefits administrator within 31 days after a person enrolled as your spouse, domestic partner or dependent child becomes ineligible for benefits. If you do not report this change on time, OEBB may consider that an intentional misrepresentation of a material fact, for which OEBB may terminate the family member's coverage effective the first of the month after eligibility was lost.

If listing a Domestic Partner as a dependent, indicate the type of Domestic Partnership*:
☐ By OEBB Affidavit of Domestic Partnership** ☐ By Registered Certificate (Copy not required)

* Domestic partner eligibility rules may vary by employing entity – verify with your benefits administrator before enrolling.

**Affidavit Information: If you are adding a domestic partner by OEBB Affidavit, you must submit the affidavit to OEBB within five business days of this enrollment or the individual's coverage will not be effective. OEBB's Affidavit of Domestic Partnership can be found online at: http://www.oregon.gov/oha/OEBB/pages/Forms.aspx

DEPENDENT A			Enroll: ☐ Medical ☐ Vision ☐ Dental
Relationship to Member: ☐ Spouse ☐ Domestic Partner	Child of: ☐ Member/Spouse ☐ Domestic Partner		Overage Disabled Dependent of: ☐ Member/Spouse ☐ Domestic Partner
Gender ☐ M ☐ F	Date of Birth (mm-dd-yyy)	Social Security, HICN, or Tax ID Number:	Medicare Eligible? ☐ Y ☐ N
Last Name	First Name		MI
Address (if different from Member address)	City	State	Zip

Ethnicity (Select One):	**Race** (Select at least one. If selecting more than one, circle one as primary):
☐ Hispanic ☐ Non-Hispanic/Latino	☐ Asian ☐ American Indian/Alaska Native ☐ Black/African American ☐ Refused
☐ Refused ☐ Unknown	☐ Native Hawaiian/Other Pacific Islander ☐ White ☐ Other ☐ Unknown

DEPENDENT B			Enroll: ☐ Medical ☐ Vision ☐ Dental
Relationship to Member: ☐ Spouse ☐ Domestic Partner	Child of: ☐ Member/Spouse ☐ Domestic Partner		Overage Disabled Dependent of: ☐ Member/Spouse ☐ Domestic Partner
Gender ☐ M ☐ F	Date of Birth (mm-dd-yyy)	Social Security, HICN, or Tax ID Number:	Medicare Eligible? ☐ Y ☐ N
Last Name	First Name		MI
Address (if different from Member address)	City	State	Zip

Ethnicity (Select One):	**Race** (Select at least one. If selecting more than one, circle one as primary):
☐ Hispanic ☐ Non-Hispanic/Latino	☐ Asian ☐ American Indian/Alaska Native ☐ Black/African American ☐ Refused
☐ Refused ☐ Unknown	☐ Native Hawaiian/Other Pacific Islander ☐ White ☐ Other ☐ Unknown

DEPENDENT C			Enroll: ☐ Medical ☐ Vision ☐ Dental
Relationship to Member: ☐ Spouse ☐ Domestic Partner	Child of: ☐ Member/Spouse ☐ Domestic Partner		Overage Disabled Dependent of: ☐ Member/Spouse ☐ Domestic Partner
Gender ☐ M ☐ F	Date of Birth (mm-dd-yyy)	Social Security, HICN, or Tax ID Number:	Medicare Eligible? ☐ Y ☐ N
Last Name	First Name		MI
Address (if different from Member address)	City	State	Zip

Ethnicity (Select One):	**Race** (Select at least one. If selecting more than one, circle one as primary):
☐ Hispanic ☐ Non-Hispanic/Latino	☐ Asian ☐ American Indian/Alaska Native ☐ Black/African American ☐ Refused
☐ Refused ☐ Unknown	☐ Native Hawaiian/Other Pacific Islander ☐ White ☐ Other ☐ Unknown

DEPENDENT D			Enroll: ☐ Medical ☐ Vision ☐ Dental
Relationship to Member: ☐ Spouse ☐ Domestic Partner	Child of: ☐ Member/Spouse ☐ Domestic Partner		Overage Disabled Dependent of: ☐ Member/Spouse ☐ Domestic Partner
Gender ☐ M ☐ F	Date of Birth (mm-dd-yyy)	Social Security, HICN, or Tax ID Number:	Medicare Eligible? ☐ Y ☐ N
Last Name	First Name		MI
Address (if different from Member address)	City	State	Zip

Ethnicity (Select One):	**Race** (Select at least one. If selecting more than one, circle one as primary):
☐ Hispanic ☐ Non-Hispanic/Latino	☐ Asian ☐ American Indian/Alaska Native ☐ Black/African American ☐ Refused
☐ Refused ☐ Unknown	☐ Native Hawaiian/Other Pacific Islander ☐ White ☐ Other ☐ Unknown

4. Plan Selection

MEDICAL

Medical Plan Selection: ______________________________

Write in plan selection.

If selecting a Moda Medical Synergy/Summit Plan, prior to the coverage start date you must contact Moda Health to select a Medical Home Provider for each covered member. A list of Medical Home Providers can be found at: https://www.modahealth.com/ProviderSearch/faces/webpages/home.xhtml

If you are choosing to *not* enroll in an OEBB medical plan, select one of the following options:

☐ **OPT-OUT** You will receive a financial incentive from your employing entity to not enroll in medical coverage. **By selecting this option, I confirm all eligible dependents have other group coverage.**

You MUST have other employer-sponsored group medical coverage. Participation or enrollment in the Oregon Health Plan, Medicaid, Veterans' Administration Benefit Programs, Medicare, or Student Health Insurance does NOT qualify for OEBB opt-out.

You must provide proof of other group coverage to your employing entity within five business days or your opt-out will not be effective:

Carrier	Policy Number	Group Number

Primary Policy Holder	Employer	Effective Date (mm/dd/yyyy)

☐ **WAIVE** You will ***not*** receive a financial incentive from your employing entity regardless of whether or not you have other medical coverage.

Note: Many employing entities do not offer a financial incentive, in those cases you should select "Waive."

DENTAL

Dental Plan Selection: ______________________________ ☐ Decline Dental

Write in plan selection.

VISION

Vision Plan Selection: ______________________________ ☐ Decline Vision

Write in plan selection. Must be enrolled in Kaiser Medical to enroll in Kaiser Vision

LATE ENROLLMENT PENALTY

I understand if I decline Dental and/or Vision coverage when initially eligible or allow coverage to lapse, then choose to enroll in one or both of these plans at a future Open Enrollment period, I and any dependents enrolled will be subject to a 12-month waiting period on these plans for services other than basic services (cleanings, x-rays, and exams only for dental; exam only for vision).

______________________________ ______________

Member Signature Date

5. Optional Plans (Member paid voluntary payroll deduction plans.)

Plan offering and availability is determined by your employing entity. *Contact your employing entity for coverage information and to find out which optional plans are available to you.*

A. Optional Life Insurance

As a newly eligible member for your first time enrollment the Optional Member Life has a guarantee issue enrollment amount of up to $100,000 and Optional Spouse/Domestic Partner Life has a guarantee issue enrollment amount of up to $30,000 without needing to submit a medical history to The Standard Insurance Company underwriting for approval.

You can find a link to the Medical History Statement on the OEBB website at:
http://www.oregon.gov/oha/OEBB/Pages/Forms.aspx

* Guarantee Issue, medical history is not required.
** You are required to submit a medical history statement on any coverage amount that is not guarantee Issue.

Member Optional Life Insurance ☐ Decline Coverage

New Hire/Newly Eligible Enrollment* $ ______________ ($10,000 increments up to $100,000)

Additional Requested Amount Above Guarantee Issue** $ ______________ ($10,000 increments up to $400,000)

Total Requested Amount $ ______________ ($500,000 maximum)

Spouse/Domestic Partner Optional Life Insurance ☐ Decline Coverage

New Hire/Newly Eligible Enrollment* $ ______________ ($10,000 increments up to $30,000)

Additional Requested Amount Above Guarantee Issue** $ ______________ ($10,000 increments up to $400,000)

Total Requested Amount $ ______________ ($500,000 maximum)

Total requested amount must be equal to or less than member optional life insurance coverage.

Child(ren) Optional Life Insurance ☐ Decline Coverage

Total Requested Amount $ ______________ ($2,000 increments up to $10,000 maximum)

Medical history is not required, you must enroll in member optional life to enroll your child(ren) in this coverage.

B. Optional Accidental Death & Dismemberment (AD&D) Insurance

Member Optional AD&D ☐ Decline Coverage

Total Requested Amount $ ______________ ($10,000 increments up to $500,000 maximum)

Medical history is not required.

Spouse/Domestic Partner Optional AD&D ☐ Decline Coverage

Total Requested Amount $ ______________ ($10,000 increments up to $500,000 maximum)

Medical history is not required. Total requested amount must be equal or less than member optional AD&D coverage.

Child(ren) Optional AD&D ☐ Decline Coverage

Total Requested Amount $ ______________ ($2,000 increments up to $10,000 maximum)

Medical history is not required. You must enroll in member optional AD&D to enroll your child(ren) in this coverage.

C. Voluntary Disability Insurance

Monthly premium is calculated on a percentage of your basic monthly salary. *A late enrollment penalty will apply if you choose to enroll in coverage at a later date or allow coverage to lapse.*

Voluntary Short Term Disability ☐ Enroll For Coverage ☐ Decline Coverage

Short Term Disability plans pay weekly benefits with coverage dates ending after 60 or 90 days depending upon plan enrollment.

Voluntary Long Term Disability ☐ Enroll For Coverage ☐ Decline Coverage

Long Term Disability plans pay monthly benefits with benefits starting after 60 or 90 day waiting periods depending upon plan enrollment.

D. Voluntary Long Term Care Insurance

Member Long Term Care enrollment as a newly eligible member has guarantee issue amounts of up to $6,000 in monthly benefit, professional home care option for 3 or 6 year duration without having to submit medical history for enrollment approval.

Enrollment requests for unlimited duration, amount over $6,000, total home care, and 5% simple inflation options, enrollment after first eligible or a future date, and Spouse/Domestic Partner Long Term Care *will require the UNUM medical history statement to be filled out and submitted to UNUM.*

You can find a link to UNUM forms on the OEBB website:
http://www.oregon.gov/oha/OEBB/Pages/Forms.aspx

* You are required to submit a medical history statement on any coverage amount that is not guarantee issue.

Member Long Term Care* ☐ Decline Coverage

Plan Option		Coverage Amount			Duration
☐ Professional Home Care	☐ Professional Home Care – 5% Inflation	☐ $2,000	☐ $5,000	☐ $8,000	☐ 3 Years
☐ Total Home Care	☐ Total Home Care	☐ $3,000	☐ $6,000	☐ $9,000	☐ 6 Years
		☐ $4,000	☐ $7,000		☐ Unlimited

Spouse/Domestic Partner Long Term Care* ☐ Decline Coverage

Plan Option		Coverage Amount			Duration
☐ Professional Home Care	☐ Professional Home Care – 5% Inflation	☐ $2,000	☐ $5,000	☐ $8,000	☐ 3 Years
☐ Total Home Care	☐ Total Home Care	☐ $3,000	☐ $6,000	☐ $9,000	☐ 6 Years
		☐ $4,000	☐ $7,000		☐ Unlimited

6. Beneficiary Designation

I elect:
☐ The Standard Order of Survivorship (If you have a Domestic Partner, an Affidavit* must be on file for distribution.)
☐ To designate the following as beneficiary (Attach additional sheets if necessary.)

Total of primary percentages must = 100% **Total of contingent percentages must = 100%**

Name			Address		
City	State	Zip	Relationship	Primary or Contingent ☐ OR ☐	Whole %
Name			Address		
City	State	Zip	Relationship	Primary or Contingent ☐ OR ☐	Whole %
Name			Address		
City	State	Zip	Relationship	Primary or Contingent ☐ OR ☐	Whole %
Name			Address		
City	State	Zip	Relationship	Primary or Contingent ☐ OR ☐	Whole %

*Affidavit Information: OEBB's Affidavit of Domestic Partnership can be found online at:
http://www.oregon.gov/oha/OEBB/pages/Forms.aspx

7. Member Signature and Authorization

I declare the dependents listed above and I are eligible for the coverages requested per OEBB Administrative Rule (OAR)-Division 10. I have read and understand OAR-Division 10 concerning Definitions and can find this OAR at

http://arcweb.sos.state.or.us/pages/rules/oars_100/oar_111/111_010.html

I have read and understand OAR-Division 80, Sections 111-080-0040, 111-080-0045 and 111-080-0050 concerning Eligibility and Policy Term Violations and can find this OAR at

http://arcweb.sos.state.or.us/pages/rules/oars_100/oar_111/111_080.html

I understand I have 31 days to notify my employer of a Qualified Status Change (QSC) which affects eligibility. I have read and understand OAR-Division 40 concerning Enrollment and can find this OAR at

http://arcweb.sos.state.or.us/pages/rules/oars_100/oar_111/111_040.html

I understand the benefit elections I make are in effect for as long as I continue to meet OEBB's eligibility requirements, or until I elect to change them subject to the provisions of OEBB's plan. I understand I cannot alter my plan selections during the plan year unless I have a QSC; then I am subject to the restrictions of the OEBB QSC's. I have reviewed and understand the Qualified Status Change (QSC) Matrix and can find the matrix at

http://www.oregon.gov/oha/OEBB/Pages/QSC-Matrix.aspx

I have read the benefit materials and I understand the limitations and qualifications of the OEBB benefits program. If necessary, I authorize premium payments deducted from my pay, unless I self-pay premiums. If I self-pay the premiums, I agree to submit monthly payments by the date specified, or my coverage will terminate; I will not be able to reinstate coverage until the next open enrollment period or may lose OEBB eligibility altogether.

A person who knowingly makes a false statement in connection with an application for any benefit may be subject to imprisonment and fines. Additionally, knowingly making a false statement may subject a person to termination of enrollment, denial of future enrollment, or civil damages.

This election supersedes all elections and submissions I previously made for OEBB coverage. I hereby declare that the above statements are true to the best of my knowledge and belief, and I understand that they are subject to penalty for perjury.

____________________________________ ____________________
Member Signature Date

Submit the completed form to your employing entity.

Do not submit this form to OEBB.