

## ASSOCIATION HEALTH PLAN APPLICATION CHECKLIST

APPLICATION WILL NOT BE CONSIDERED COMPLETE WITHOUT  
THE REQUIRED DOCUMENTATION LISTED BELOW.

Please be aware that rates are subject to change based on final information and census.

Business Name \_\_\_\_\_ Effective Date \_\_\_\_\_

### ALL APPLICANTS

- ☐ Completed application and plan selections
- ☐ Current Nevada State Business License or Notice of Exemption letter from Nevada Secretary of State
- ☐ Completed Common Ownership Attestation
- ☐ Completed Business Attestation *(Partnerships Only)*
- ☐ Enrollment application, electronic enrollment application, or enrollment file for electronic eligibility
- ☐ Estimated 1st month premium binder check or one-time payment form
  - Any discrepancy between the binder amount and the final enrollment will be billed or credited on the first premium bill.

### BUSINESSES WITH "W-2" EMPLOYEES

- ☐ Most recent filed State Wage & Quarterly
  - Businesses in operation less than three months must submit Articles of Incorporation along with two weeks of payroll in lieu of the State Wage & Quarterly.
- ☐ Two weeks of payroll receipts for employees that do not appear on the group's State Wage & Quarterly
  - Business Verification Form maybe submitted in lieu of payroll at Underwriting's approval
- ☐ Waiver of Health Coverage Benefits for all Eligible Employees who are waiving coverage or who are eligible for and/or participating in COBRA. "Eligible Employee" means a permanent employee who has a regular working week of 30 or more hours

### BUSINESSES WITH OWNERS THAT DO NOT APPEAR ON THE STATE WAGE & QUARTERLY

#### PROVIDE AT LEAST ONE ITEM FROM THE LIST BELOW

- ☐ Partnership Business Type – US Return of Partnership Income Form 1065 *(Schedule K-1)*
- ☐ S Corporation Business Type – US Return of Shareholder Income Form 1120S *(Schedule K-1)*
- ☐ Limited Liability Company (LLC) with Partners – Form 1065 *(Schedule K-1)*

## HEALTH INSURANCE APPLICATION CHECKLIST

DOCUMENTATION REQUIREMENTS FOR EACH BUSINESS TYPE.

| Business Type                          | In business<br>more than 3 months                                                                                                                                         | In business<br>less than 3 months                                           |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| <b>C CORPORATION</b>                   | Nevada Employer's Quarterly Contribution and Wage Report                                                                                                                  | Payroll records and Articles of Incorporation                               |
| <b>S CORPORATION</b>                   | Nevada Employer's Quarterly Contribution and Wage Report or K-1 for shareholder's income                                                                                  | Payroll records and Articles of Incorporation                               |
| <b>PARTNERSHIP</b>                     | K-1 for partner's income or Schedule SE (self-employment tax) or Form 1065 Partnership Return and Nevada Employer's Quarterly Contribution and Wage Report for employees. | Partnership Agreement and SS-4 (application for tax id) and payroll records |
| <b>LIMITED LIABILITY COMPANY (LLC)</b> | May file as either a C Corporation or a Partnership (refer to above)                                                                                                      | May file as either a C Corporation owner or a Partnership (refer to above)  |

## COMMON OWNERSHIP CERTIFICATION

PLEASE COMPLETE, SIGN AND SUBMIT THE COMMON OWNERSHIP CERTIFICATION.

This form must be filled out and returned even if you do not have multiple companies.

Please list all employer groups that qualify under 26 USC Section 414(b) (c) (m) or (o) of the Internal Revenue Code.

### COMPANY INFORMATION

Name of Employer Group \_\_\_\_\_  
 Business Owner \_\_\_\_\_  
 Primary Business Location \_\_\_\_\_

| Name of Business Entity | Employer Federal Tax ID Number (FEIN) | Percentage of Ownership | Number of Full-Time Equivalent (FTE) Employees |
|-------------------------|---------------------------------------|-------------------------|------------------------------------------------|
| 1                       |                                       |                         |                                                |
| 2                       |                                       |                         |                                                |
| 3                       |                                       |                         |                                                |
| 4                       |                                       |                         |                                                |
| 5                       |                                       |                         |                                                |
| 6                       |                                       |                         |                                                |

- **A FULL-TIME EMPLOYEE** is an employee who is employed on average, per month, at least 30 hours of service per week, or at least 130 hours of service in a calendar month.
- **A FULL-TIME EQUIVALENT EMPLOYEE** is a combination of employees, each of whom individually is not a full-time employee, but who, in combination, are equivalent to a full-time employee.
- **AN AGGREGATED GROUP** is commonly owned or otherwise related or affiliated employers, which must combine their employees to determine their workforce size.

I certify that the group named above is a single employer under section 414 of the Internal Revenue Code of 1986 (26 U.S.C. Section 414 (b), (c), (m), or (o)), and under any applicable state law. I further certify that there are no other affiliated entities other than the ones listed above who are eligible to file a combined state tax return. I represent that, to the best of my knowledge, the information I have provided is accurate and truthful. I understand that any misrepresentation or fraudulent statement may result in rescission of the group policy, termination of coverage, an increase in premiums retroactive to the policy date, or other consequences as permitted by law.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Relationship to company** (Please Check One of the Following)

☐ Owner
 ☐ HR Rep
 ☐ Accountant for Employer
 ☐ Attorney representing employer



**Adoption Agreement & Eligibility Attestation  
for  
Association Health Plan Employer Group Enrollment**



***Groups that are new to this Association must complete this entire application.***

***Groups that are renewing must complete this page and any section that has changed from the previous year's application.***

This ADOPTION AGREEMENT & ELIGIBILITY ATTESTATION FOR ASSOCIATION HEALTH PLAN EMPLOYER GROUP ENROLLMENT ("Agreement") in the association health plan program provided by the Manufacturing Benefit Trust Fund or the Service Benefit Trust Fund ("Association"), as applicable, is hereby submitted by the following Employer Group:

1. FULL LEGAL NAME OF EMPLOYER GROUP

2. LOCATION ADDRESS

Street

City

State

Zip Code

3. REQUESTED EFFECTIVE DATE (first of a month)

ASSOCIATION GROUP ID

All days begin and end at 12:00 midnight. All initial and renewal terms will be 12 months

I certify and attest that Employer Group desires to enroll in the association health plan offered by the applicable Association indicated below, that Employer Group agrees to the terms of this Agreement and to the terms of the Policy and that:

1. Employer Group is a bona-fide business establishment that meets and will continue to meet all participation requirements, including continued membership in the Carson City Chamber of Commerce.
2. This Agreement authorizes Association, or its authorized representative, to audit applicable records, no more than one time annually, to confirm that Employer Group meets the eligibility requirements. Such audit shall not cause undue burden on Employer Group. Employer Group may require Association, or its authorized representative, as applicable, to sign reasonable confidentiality agreements.
3. Employer Group understands that Association and/or its contracted insurer has the right to accept or reject the application for association health plan coverage. Coverage will not commence until the application has been accepted.
4. Employer Group understands and agrees to distribute all plan documents consistent with Association's Guidelines for SPD Distribution, abide by the eligibility rules applicable to employee and dependent enrollment, COBRA continuation of coverage notice requirements, regardless of the number employees employed by Employer Group, and payment rules as provided in the approved Plan, this Agreement and the Policy and that this Agreement can only be revised at renewal in writing.
5. Employer Group understands that all association health plan coverage under this Agreement, including any coverage for individuals covered under COBRA continuation of coverage, may be terminated if Employer Group fails to pay the applicable monthly fees as billed by the due date or completion of the grace period, as applicable.
6. Employer Group will fully defend, indemnify and hold harmless Association and its trustees, employees, consultants and administrators against any and all loss, damage, liability, claim, demand or suit resulting from injury or harm to any person or property arising out of or in any way connected with the participation of the Employer Group under this Agreement. This is intended to include, but is not limited to, employment-related claims, statutory violations, breach of contract claims and claims for damages resulting from personal injury or injury to property.
7. Employer Group understands this Agreement can only be revised at renewal in writing and that Employer Group will comply with the Association's policies and procedures as well as the Trust Agreement as it may be revised in the future.
8. The undersigned representative of Employer Group has reviewed the above information and agrees to its accuracy.

Print name and title of **Employer Group** representative

Signature of **Employer Group** representative (cannot be group's insurance broker)

Date

**Producer** Title, Name & Agency

**Producer** Signature

Date

☐ Manufacturing Trust

☐ Service Trust

Indicate your plan selections

|  |
|--|
|  |
|  |
|  |

For Hometown Health use only:

Approved effective date: \_\_\_\_\_

Parent code: \_\_\_\_\_

## GROUP APPLICATION – INFORMATION DOCUMENT

This document will be requested to be reviewed annually at the health plan renewal period.

### 1 Full Legal Name of Employer Group (Contract Holder)

1a. Doing Business As \_\_\_\_\_

1b. Federal Tax ID Number \_\_\_\_\_

1c. IRS Section 125

☐ YES

☐ NO

### 2 Address

Physical Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

Mailing Address (If different – Street or PO Box) \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

2a. Telephone \_\_\_\_\_

2b. Fax \_\_\_\_\_

2c. Email \_\_\_\_\_

### 3 Name / Title of Owner, General Manager or CEO

Name \_\_\_\_\_

Title \_\_\_\_\_

3a. Telephone \_\_\_\_\_

3b. Fax \_\_\_\_\_

3c. Email \_\_\_\_\_

### 4 Business Industry or Nature of Business

### 5 NAICS Code (If available)

5a. NAICS Description \_\_\_\_\_

### 6 Company Type

☐ Corporation

☐ Non-Profit

☐ Political Subdivision

☐ Sole Proprietorship

☐ LLC

☐ Partnership

☐ S Corp.

☐ Union

☐ Other \_\_\_\_\_

### 7 Year Business Established

7a. Number of Employees (FT & PT) \_\_\_\_\_

7c. Number of Employees Waiving Enrollment \_\_\_\_\_

7b. Number of Employees Eligible To Enroll \_\_\_\_\_

7d. Please check appropriate box below to indicate your organization's size.\*

☐ Less than 20 full- or part-time employees\*\*

☐ 20 to 99 full- or part-time employees\*\*

☐ 100 or more full- or part-time employees\*\*

\*Mandatory Insurer Reporting Law-Section 111 of Public Law 110-173

\*\*If organization is part of a multi-employer plan (a group of plans), please count employees in other groups/plans also.

### 8 Does Your Company Currently Offer Health Insurance?

8a. If Yes, please list the carrier information below

8b. Does your company offer other insurance options? (e.g. Dental and/or Vision)

☐ YES

☐ NO

If Yes, please list below

Coverage Type \_\_\_\_\_

Carrier Name \_\_\_\_\_

Coverage Type \_\_\_\_\_

Carrier Name \_\_\_\_\_

### 9 Employer Contribution to Employee and Dependent Premium

Enter the Percentage or Dollar Amount; Minimum is 50% of Employee Premium

Hourly

Salaried

Other (Please specify) \_\_\_\_\_

Employee \_\_\_\_\_

Employee \_\_\_\_\_

Employee \_\_\_\_\_

Dependent \_\_\_\_\_

Dependent \_\_\_\_\_

Dependent \_\_\_\_\_

## GROUP INFORMATION

### A COMPANY BENEFIT ADMINISTRATOR(S)

#### 1a. Corporate Contact

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_  
 Title \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone \_\_\_\_\_ Extension \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_  
☐ Receives Contract / Renewal Notices ☐ Receives Hometown Health Employer Newsletter

#### 2a. Local Contact *(If Same as Corporate Contact, Leave Blank)*

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_  
 Title \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone \_\_\_\_\_ Extension \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_  
☐ Receives Contract / Renewal Notices ☐ Receives Hometown Health Employer Newsletter

#### 3a. Premium Billing Contact *(If Different than Contacts Listed Above)*

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone \_\_\_\_\_ Extension \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

#### 4a. Other Company Contacts *(If Applicable)*

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone \_\_\_\_\_ Extension \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

### B GROUP PLAN SELECTION

**1b. Number of Plans Selected by Employers** – Hometown Health allows Small Employers to select up to two (2) plans for less than five enrolled employees and up to three (3) plans for five or more enrolled employees. There is no restriction of metal levels offered.

|                              |                              |                              |                                 |
|------------------------------|------------------------------|------------------------------|---------------------------------|
| <input type="checkbox"/> HMO | <input type="checkbox"/> EPO | <input type="checkbox"/> PPO | <input type="checkbox"/> Vision |
| <b>Plan Elected</b>          | <b>Plan Elected</b>          | <b>Plan Elected</b>          | <b>Plan Elected</b>             |

|       |       |       |       |
|-------|-------|-------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |



## COBRA ADMINISTRATOR

IF YOU ARE AN EMPLOYER WHO HAD A TOTAL OF 20 OR MORE EMPLOYEES (including full-time, part-time, seasonal, per diem, etc.) for at least 50% of the previous calendar year (i.e., 6 months or more), you are required to offer COBRA coverage. This requirement also applies if you offer health benefits through an Association Health Plan, regardless of employee count. Hometown Health is partnered with iSolved to provide basic COBRA administration at no additional cost, included in your health benefits plans—making compliance easier for you.

### IF YOUR GROUP QUALIFIES TO OFFER COBRA, PLEASE COMPLETE ALL SECTIONS BELOW:

Legal Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Federal Employer Identification Number \_\_\_\_\_  
Total Number of Eligible Employees \_\_\_\_\_  
Total Number of Insured Employees \_\_\_\_\_  
Service Start Date \_\_\_\_\_  
Signer Name \_\_\_\_\_  
Signer Email \_\_\_\_\_  
Broker Name \_\_\_\_\_  
Broker Email \_\_\_\_\_

**Once we receive this information, we will send it to iSolved.  
iSolved will then send documentation to the Signer's email address via DocuSign.  
THE DocuSign MUST BE COMPLETED AND SIGNED  
IN ORDER FOR THE GROUP TO BE ESTABLISHED WITH iSolved.**

## GROUP ELIGIBILITY AND PAYMENT PROVISIONS

Please return with renewal/new packet.

**A Company Name** \_\_\_\_\_

Check categories in each Provisions Section: **B – Eligibility Status** and **C – Commencement of Coverage**

### **B ELIGIBILITY STATUS** (Check All Categories Applicable)

| Salaried                 | Hourly                   | Other (Please List)            | 1b. Eligible Employees:                                                                                         |
|--------------------------|--------------------------|--------------------------------|-----------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> _____ | <input type="checkbox"/> Active Employees <input type="checkbox"/> Retirees                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> _____ | <input type="checkbox"/> Permanent Full Time Employees* <input type="checkbox"/> Leave of Absence               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> _____ | <input type="checkbox"/> Other (Attach Explanation)                                                             |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> _____ | *Eligible employee means a permanent employee who has a regular working week of 30 or more hours.../NRS689C.065 |

### **2b. Dependent Policy** (Please select one)

- ☐ Employee Only (available for Employers with fewer than 50 full-time equivalent Employees)
- ☐ Employees and dependent children
- ☐ Employees, spouse and dependent children
- ☐ Employees, spouses, domestic partners and dependent children

### **C COMMENCEMENT OF COVERAGE** (Check All Categories Applicable)

#### ELIGIBLE EMPLOYMENT BEGINS ON

- ☐ Date of Hire (Default)
- OR
- ☐ Following a reasonable and bona fide employment-based orientation period of \_\_\_\_\_ days (not to exceed 30 days).  
By selecting this box you attest that the orientation period you require is both reasonable and bona fide.  
Eligible employment also begins when a part time employee begins to work full time.

| Salaried                 | Hourly                   | Other (Please List)            | 1c. Newly Eligible Employees Effective For Coverage                                                                                                                                             |
|--------------------------|--------------------------|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> _____ | <input type="checkbox"/> 1st of Month on or following date of eligible employment<br>Termination of Coverage = Last day of month which employee ceases to be eligible                           |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> _____ | <input type="checkbox"/> 1st of the Month on or following _____ day(s) of eligible employment (60 days max)<br>Termination of Coverage = Last day of month which employee ceases to be eligible |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> _____ | <input type="checkbox"/> 1st of Month on or following 1 month of eligible employment<br>Termination of Coverage = Last day of month which employee ceases to be eligible                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> _____ | <input type="checkbox"/> Additional Information (Attach Explanation)<br>Termination of Coverage = _____                                                                                         |

Termination of Coverage = Last day of month which employee ceases to be eligible

### **2c. Newly Eligible Dependents – Births and Loss of Coverage Will Always be Date of Event**

- ☐ 1st of Month following Date of Eligibility/Event ☐ Date of Eligibility/Event ☐ Other (If other, explain below)



## C COMMENCEMENT OF COVERAGE (Continued)

If this section is not addressed, policy will default to Newly Eligible Employee Provision  
- only applies to employees covered prior to termination with current carrier.

### 3c. Rehire Employee Policy

☐ DOES NOT APPLY

OR

☐ DOES APPLY

If Rehired within ☐ Days OR ☐ Months of Termination, then Coverage is Effective 1st of the Month on or following.

## D PAYMENT PROVISIONS

| Full Monthly Premium                 |                                                                 |
|--------------------------------------|-----------------------------------------------------------------|
| IF COMMENCEMENT OF COVERAGE FALLS ON | The 1st through the 15th of the month - <b>FULL PREMIUM DUE</b> |
|                                      | The 16th through the end the month - <b>NO PREMIUM DUE</b>      |
| IF TERMINATION OF COVERAGE FALLS ON  | The 1st through the 14th of the month - <b>NO PREMIUM DUE</b>   |
|                                      | The 15th through the end the month - <b>FULL PREMIUM DUE</b>    |

Updates and revisions to these provisions can **ONLY** be made at renewal date of health plan(s)  
and must be approved by carrier. All Changes must be submitted in writing.

Authorized signature required below for approval of current provisions or changes made.

Print Name \_\_\_\_\_ Date \_\_\_\_\_

Print Title of Company Representative \_\_\_\_\_

Signature of Company Representative \_\_\_\_\_

Primary Contact \_\_\_\_\_ Email Address \_\_\_\_\_

Secondary Contact \_\_\_\_\_ Email Address \_\_\_\_\_

The Group appoints the following Company / Agency as Producer of Record:

Print Company / Agency \_\_\_\_\_

Print Producer Name \_\_\_\_\_

### AREA FOR HOMETOWN HEALTH USE ONLY

Renewal Effective Date \_\_\_\_\_

Date \_\_\_\_\_ SSR \_\_\_\_\_ Section Changed \_\_\_\_\_ Effective Date \_\_\_\_\_



## NEW GROUP INITIAL ONE-TIME BINDER PAYMENT eCheck/Credit Card Authorization Form

This form provides authorization to draft Company's initial one-time binder payment for new group premium.

**PLEASE FILL OUT THE INFORMATION BELOW**  
to have an eCheck or Credit Card withdrawal for company's initial one-time binder payment.

.....

Company Name \_\_\_\_\_  
Billing Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Email Address \_\_\_\_\_

.....

### BINDER PREMIUM INFORMATION

Initial One-Time Binder Payment Amount \$ \_\_\_\_\_

.....

**BANK ACCOUNT TYPE** – CHECK ONE ☐ **Checking** ☐ **Savings**

Account Holder Name \_\_\_\_\_  
Routing Number \_\_\_\_\_  
Account Number \_\_\_\_\_

.....

### IF PAYING BY CREDIT CARD

Account Holder Name \_\_\_\_\_  
Account Number \_\_\_\_\_ Exp Date \_\_\_\_\_  
Security Code \_\_\_\_\_ (3 TO 4 DIGIT CODE ON BACK OR FRONT OF CARD)

.....

**Authorization Agreement:** By signing below, I confirm that I am an authorized representative and signatory of the above Company and hereby authorize Hometown Health to withdraw the **INITIAL ONE-TIME BINDER PAYMENT** from Company's bank or credit card account. I understand that this **INITIAL ONE-TIME BINDER PAYMENT** will be deducted from Company's account within one (1) to two (2) days after notification of Hometown Health's approval of Company's enrollment in a Hometown Health plan.

Name (PRINTED) \_\_\_\_\_ Company Title \_\_\_\_\_

Company's Authorized Representative Signature \_\_\_\_\_ Date \_\_\_\_\_

.....

### FOR INTERNAL USE ONLY

Date funds withdrawn \_\_\_\_\_ Initials \_\_\_\_\_ Confirmation/Transaction# \_\_\_\_\_ (ATTACH RECEIPTS)  
**AMOUNT** EPO/HMO \$ \_\_\_\_\_ Invoice# \_\_\_\_\_ PPO \$ \_\_\_\_\_ Inv# \_\_\_\_\_

.....

G# \_\_\_\_\_  
 M# \_\_\_\_\_  
 L \_\_\_\_\_  
 F, M \_\_\_\_\_



## ENROLLMENT / CHANGE FORM

### HUMAN RESOURCES ONLY

Employer \_\_\_\_\_ Group Number \_\_\_\_\_

Effective Date \_\_\_\_\_ Employee's Weekly Hours \_\_\_\_\_ Employee's Date of Hire \_\_\_\_\_

Employer Signature \_\_\_\_\_

### EMPLOYEE INFORMATION

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

Physical Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_

**Marital Status** ☐ Married ☐ Single ☐ Divorced ☐ Widowed

Occupation \_\_\_\_\_ Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

### PLAN ELECTED

☐ HMO

**Plan Elected**

☐ EPO

**Plan Elected**

☐ PPO

**Plan Elected**

### OTHER MEDICAL COVERAGE

**Do you or any of your Dependents listed on the next page have Medical/Health Insurance**

(Including Medicare/Medicaid)?

☐ **YES** ☐ **NO**

If yes, please provide copy of insurance card (front & back).

### CONTRACT TERMINATION ONLY

**Completion of this section will terminate coverage for subscriber and all dependents.**

☐ Left Company

☐ Deceased

☐ Moved

☐ Ineligible

☐ Dissatisfied

☐ Other (If other, explain below)

### REASON FOR CHANGE

☐ New Hire

☐ Name

☐ Annual Election

☐ Rehire

☐ COBRA (18-29-36)

☐ Other (If other, explain below)

☐ PT/FT

☐ Reinstatement

☐ Waive Coverage

☐ Retiree

☐ Transfer

☐ Address

### ADD/DELETE DEPENDENT

☐ Marriage\*\*

☐ Birth/Adoption\*\*

☐ Loss of Dependent Status\*\*

☐ Loss of Insurance\*\*

☐ Divorce\*\*

☐ Other\*\*

☐ Court Ordered/  
Legal Guardianship\*\*

☐ Deceased\*\*

\*\*Attach legal documentation as proof of event.

**Plan Change** From \_\_\_\_\_ To \_\_\_\_\_

## MEMBER INFORMATION – COMPLETE WITH NEW OR CHANGE INFORMATION

### EMPLOYEE

Action

☐ Add

☐ Change

☐ Delete

Last Name\*\* \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_

Sex ☐ Male ☐ Female

Email Address \_\_\_\_\_ Primary Care Physician (if required)<sup>†</sup> \_\_\_\_\_

THIS SPACE IS FOR HOMETOWN HEALTH USE ONLY

### SPOUSE

Action

☐ Add

☐ Change

☐ Delete

Last Name\*\* \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_

Sex ☐ Male ☐ Female

Reside with Employee?

☐ YES

☐ NO

Email Address \_\_\_\_\_ Primary Care Physician (if required)<sup>†</sup> \_\_\_\_\_

THIS SPACE IS FOR HOMETOWN HEALTH USE ONLY

### DEPENDENT CHILD (Relationship)

Action

☐ Add

☐ Change

☐ Delete

Last Name\*\* \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_

Sex ☐ Male ☐ Female

Reside with Employee?

☐ YES

☐ NO

Email Address \_\_\_\_\_ Primary Care Physician (if required)<sup>†</sup> \_\_\_\_\_

THIS SPACE IS FOR HOMETOWN HEALTH USE ONLY

### DEPENDENT CHILD (Relationship)

Action

☐ Add

☐ Change

☐ Delete

Last Name\*\* \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_

Sex ☐ Male ☐ Female

Reside with Employee?

☐ YES

☐ NO

Email Address \_\_\_\_\_ Primary Care Physician (if required)<sup>†</sup> \_\_\_\_\_

THIS SPACE IS FOR HOMETOWN HEALTH USE ONLY

### DEPENDENT CHILD (Relationship)

Action

☐ Add

☐ Change

☐ Delete

Last Name\*\* \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_

Sex ☐ Male ☐ Female

Reside with Employee?

☐ YES

☐ NO

Email Address \_\_\_\_\_ Primary Care Physician (if required)<sup>†</sup> \_\_\_\_\_

THIS SPACE IS FOR HOMETOWN HEALTH USE ONLY

### DEPENDENT CHILD (Relationship)

Action

☐ Add

☐ Change

☐ Delete

Last Name\*\* \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_

Sex ☐ Male ☐ Female

Reside with Employee?

☐ YES

☐ NO

Email Address \_\_\_\_\_ Primary Care Physician (if required)<sup>†</sup> \_\_\_\_\_

THIS SPACE IS FOR HOMETOWN HEALTH USE ONLY

\*\*Attach legal documentation as proof of action (Add, Change or Delete).

<sup>†</sup> It is member's responsibility to verify physician availability in their area.

### ACKNOWLEDGMENT OF TERMS

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

See Next Page



## ACKNOWLEDGMENT OF TERMS

I understand and agree that, with the exception of emergency procedures, all services must be performed by a Hometown Health participating provider, or authorized in advance by Hometown Health, to be considered for payment at the in-network rate. Additional requirements may apply. See the appropriate plan documents for details.

I understand that I am responsible for paying any required deductibles, copayments, and coinsurance directly to the providers of healthcare at the time of service.

I agree to be bound by all terms of the plan under which I am applying for coverage for as long as I am covered under the plan.

I certify that, to the best of my knowledge, the information shown on the front of this form is correct.

I have read and understand the terms of this application.

My signature on the front of this form constitutes acceptance of the terms listed above.

### Key to Plan Types

- HMO** Health Maintenance Organization
- EPO** Exclusive Provider Organization
- PPO** Preferred Provider Organization
- TPA** Third Party Administrator for self-funded plan
- HSA** Health Savings Account

## STATEMENT OF ACCOUNTABILITY

To be completed only when the applicant cannot complete the application

**NOTE: Translator must be 18 years or older to translate the application on behalf of the applicant**

I, \_\_\_\_\_, personally read and completed this Individual Application for the applicant named below because:

- ☐ Agent assisted application      ☐ Applicant does not read English      ☐ Applicant does not speak English  
☐ Applicant does not write English      ☐ Other (Explain) \_\_\_\_\_

I translated the contents of this form and to the best of my knowledge obtained and listed all the requested personal and medical history disclosed by the:

- ☐ Applicant      ☐ Or by \_\_\_\_\_

I also translated and fully explained the "Application Understandings, Conditions and Agreement," and "Payment Method."

Translator Signature (Required) \_\_\_\_\_ Date (Required) \_\_\_\_\_

I confirm that the application was translated on my behalf.

Applicant Signature (Required) \_\_\_\_\_ Date (Required) \_\_\_\_\_

Language interpreted (e.g. Spanish) \_\_\_\_\_



## WAIVER OF HEALTH COVERAGE BENEFITS

All the sections on this form must be completed and signatures are required from employee and employer.  
SEE INSTRUCTIONS ON PAGE 2

### EMPLOYER INFORMATION

Name of Employer \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Telephone \_\_\_\_\_

### APPLICANT / EMPLOYEE INFORMATION

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Social Security Number \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_  
Date of Hire \_\_\_\_\_ Job Title \_\_\_\_\_

### OTHER COVERAGE INFORMATION

Do you have other health benefit coverage?

- ☐ **YES** – If Yes, please complete below  
☐ **NO** – I do not have other health insurance coverage

#### Coverage Information

Name of primary person on policy \_\_\_\_\_  
Name of Employer or the Party providing health care coverage \_\_\_\_\_  
Name(s) of dependent(s) covered on policy \_\_\_\_\_  
Name of health plan provider / insurer \_\_\_\_\_

**PLEASE ATTACH A PHOTOCOPY OF YOUR HEALTH PLAN PROVIDER ID CARD.**

### VALIDATION OF WAIVER OF BENEFITS

*I understand that I have been offered group health insurance by my employer, with Hometown Health. I have elected **NOT** to enroll myself, and/or my dependent(s). I understand that if I and/or my dependent(s) decide, at some time in the future, that I (we) desire this coverage, I must wait for my employer's "open enrollment" period, or special enrollment period due to qualifying event. (i.e.: Divorce, marriage, birth of child, death, loss of medical insurance, etc).*

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_  
Employer Signature \_\_\_\_\_ Date \_\_\_\_\_

Comments \_\_\_\_\_



## INSTRUCTIONS

ALL THE SECTIONS ON THIS FORM MUST BE COMPLETED  
and signatures are required from employee and employer.

### EMPLOYER INFORMATION

- 1 Enter company data in the appropriate Employer information areas.

### APPLICANT / EMPLOYEE INFORMATION

- 1 Enter your personal data in the appropriate Applicant / Employee information areas.

### OTHER COVERAGE INFORMATION

- 1 Please indicate if you do or do not have other health benefit coverage.
- 2 Please indicate the name of both the Employer, the primary member holding this insurance coverage and the insurance carrier providing you and/or your dependents with the coverage.
- 3 Attach a photocopy of the Plan Provider ID card.

### VALIDATION OF WAIVER OF BENEFITS

- 1 **EMPLOYEE**  
Read the statement carefully, then sign and date the Waiver of Coverage Form. Please return the form to your employer.
- 2 **EMPLOYER**  
Please sign form before returning to Hometown Health.