



Wellmark Blue Cross Blue Shield of Iowa  
Wellmark Health Plan of Iowa, Inc.

Independent Licensees of the Blue Cross and  
Blue Shield Association

# Self-Funded Group Employee Application for Health and Dental Coverage

Wellmark Blue Cross and Blue  
Shield of Iowa  
PO Box 9232 - MS 3W294  
Des Moines, IA 50306-9232  
Fax (515)376-9047

Failure to fill out this application completely may result in a delay of coverage.

Late Enrollee  Special Enrollee  Change  Open Enrollment Period  Newly Eligible

**BlueDental**<sup>SM</sup>  
**BlueDental PPO**<sup>SM</sup>

## A. Employer Information (Completed by Employer)

Group/Billing Unit No.: \_\_\_\_\_ Effective Date: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Employer Name: \_\_\_\_\_  
Employer Address Line 1 (Street Address or Suite#): \_\_\_\_\_  
Employer Address Line 2 (PO Box, Street Address): \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_  
Employee Classification: \_\_\_\_\_

## B. Employee Information

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last Name \_\_\_\_\_  
Address Line 1 (Street Address or Apt/Suite#) \_\_\_\_\_  
Address Line 2 (PO Box, Street Address) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
Home Phone Number (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Work Phone Number (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Ext. \_\_\_\_\_  
Email address (optional) \_\_\_\_\_  
Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ (mm/dd/yyyy) Social Security Number/Tax Identification Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
(Social Security Number (SSN) or Tax Identification Number (TIN) must be provided.)  
Gender  M  F Status  Married  Single  Common Law  
Date of Hire (required) \_\_\_\_/\_\_\_\_/\_\_\_\_ (mm/dd/yyyy)  
Employment Status  Full-Time  Part-Time  COBRA  Retiree  Seasonal  
Health:  Employee  Employee/Spouse  Employee/Child(ren)  Employee/Spouse/Child(ren)  
Health Plan Code: \_\_\_\_\_ Deductible Amount: \_\_\_\_\_  
Blue Dental:  Employee  Employee/Spouse  Employee/Child(ren)  Employee/Spouse/Child(ren)  
Blue Dental Plan Code: \_\_\_\_\_ Deductible Amount: \_\_\_\_\_

The Summary of Benefits and Coverage you have received or will be receiving includes important information about the Wellmark coverage available to you. In addition, there is important information available to you at Wellmark.com/Inform that addresses a number of topics such as Wellmark's guidelines on investigational and experimental procedures, the methodologies Wellmark uses to compensate providers, and information on how to access Wellmark's internal claims appeal and external review process. You can also obtain this information by calling the Customer Service number on the back of your Wellmark identification card.

Employee Name (First, Last)	Social Security Number
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**C. Enrollment Reason or Event**

**Special Enrollment Event Reason:**

<input type="checkbox"/> Birth	<input type="checkbox"/> Legal guardianship
<input type="checkbox"/> Marriage/common law	<input type="checkbox"/> Foster child placement
<input type="checkbox"/> Divorce	<input type="checkbox"/> Involuntary loss of creditable coverage
<input type="checkbox"/> Adoption or placement for adoption	<input type="checkbox"/> Permanent move to Iowa
<input type="checkbox"/> Court-ordered coverage	<input type="checkbox"/> Returning from military service
<input type="checkbox"/> Other: _____	

List date of special enrollment event \_\_\_\_/\_\_\_\_/\_\_\_\_ (mm/dd/yyyy) (or last day of coverage)

**D. Members/Enrollees Covered** If you need to list more than four dependents, please write all necessary information on a separate sheet of paper and attach to this application. Your employer determines eligibility for coverage. Please confirm with your employer that the dependent types listed below are eligible.

Name (First, MI, Last)	Date of Birth (mm/dd/yyyy)	Social Security Number/ Tax Identification Number <sup>1</sup>	Gender	FT Student? <sup>2</sup>	Disabled? <sup>2</sup>
<input type="checkbox"/> Spouse	____/____/____	a. SSN/TIN _____ b. <input type="checkbox"/> Does not have an SSN/TIN c. <input type="checkbox"/> I refuse to provide the SSN/TIN	<input type="checkbox"/> M <input type="checkbox"/> F	N/A	<input type="checkbox"/> Yes
<input type="checkbox"/> Dependent	____/____/____	a. SSN/TIN _____ b. <input type="checkbox"/> Does not have an SSN/TIN c. <input type="checkbox"/> I refuse to provide the SSN/TIN	<input type="checkbox"/> M <input type="checkbox"/> F	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Dependent	____/____/____	a. SSN/TIN _____ b. <input type="checkbox"/> Does not have an SSN/TIN c. <input type="checkbox"/> I refuse to provide the SSN/TIN	<input type="checkbox"/> M <input type="checkbox"/> F	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Dependent	____/____/____	a. SSN/TIN _____ b. <input type="checkbox"/> Does not have an SSN/TIN c. <input type="checkbox"/> I refuse to provide the SSN/TIN	<input type="checkbox"/> M <input type="checkbox"/> F	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Dependent	____/____/____	a. SSN/TIN _____ b. <input type="checkbox"/> Does not have an SSN/TIN c. <input type="checkbox"/> I refuse to provide the SSN/TIN	<input type="checkbox"/> M <input type="checkbox"/> F	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes

<sup>1</sup>The IRS requires Wellmark to collect SSNs/TINs for federal reporting purposes. Wellmark will follow up with you to collect this information if you do not complete a., b., or c. for each person listed. Failure to provide the SSN/TIN information may result in a \$50 penalty, per violation, assessed to you by the IRS.  
<sup>2</sup>Dependent(s) age 26 or older must be unmarried and either a full-time student or a disabled dependent (disability information requested in Section E).

**E. Medicare Coverage (Required.)**

Yes  No Are you and/or anyone listed in Section D Social Security disabled?  
 If yes, list names \_\_\_\_\_

Yes  No Are you and/or anyone listed in Section D enrolled in Medicare?  
 If yes, complete following as appropriate:

Employee Name (as it appears on Medicare card): _____	Medicare ID (HIC) No.: _____
Effective Date (Part A): ____/____/____	Effective Date (Part B): ____/____/____
Spouse Name (as it appears on Medicare card): _____	Medicare ID (HIC) No.: _____
Effective Date (Part A): ____/____/____	Effective Date (Part B): ____/____/____
Dependent Name (as it appears on Medicare card): _____	Medicare ID (HIC) No.: _____
Effective Date (Part A): ____/____/____	Effective Date (Part B): ____/____/____

Employee Name (First, Last)	Social Security Number
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**F. Other Carrier Information (Required.)**

Yes  No Will you, your spouse, or your dependents keep other health coverage in addition to this Wellmark, Inc. coverage?  
 If yes, please complete the following:  
 Policyholder Name (First, Last): \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Please list those covered by other health plan(s): \_\_\_\_\_  
 Policy No.: \_\_\_\_\_ Effective Date: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Employer Name (if coverage is through employer group): \_\_\_\_\_  
 Insurance Company/HMO Name: \_\_\_\_\_  
 Address Line 1 (Street Address or Suite #): \_\_\_\_\_  
 Address Line 2 (PO Box, Street Address): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_  
 Phone Number: (\_\_\_\_) \_\_\_\_\_  
 Yes  No Is there a divorce decree/court order that requires one parent to provide health insurance coverage for any dependent? If yes, please complete the following:  
 List dependent(s): \_\_\_\_\_  
 List name of person required to provide health insurance: \_\_\_\_\_  
 List name of person who has primary physical custody: \_\_\_\_\_

**G. Waiver of Enrollment (Please complete if you are waiving health or dental benefits.)**

I waive health coverage for my dependents and myself. Please indicate one of the following reasons:  
 I (We) have coverage under another health care benefit plan.  
 I (We) do not wish to enroll in the health plan.  
 I waive Blue Dental coverage for my dependents and myself. Please indicate one of the following reasons:  
 I (We) have coverage under another dental plan.  
 I (We) do not wish to enroll in the Blue Dental plan.  
 Please see Section H: Important Information Regarding Waiver of Enrollment.

**H. Important Information Regarding Waiver of Enrollment**

If you are declining enrollment for yourself or your dependents (including your spouse) because of other health insurance or group health plan coverage, you may be able to enroll yourself or your dependents in this plan if you or your dependents lose eligibility for that other coverage (or if the employer stops contributing toward your or your dependents' other coverage). However, you must request enrollment within a period of time specified by your employer after your or your dependents' other coverage ends (or after the employer stops contributing toward the other coverage). In addition, if you have a new dependent as a result of marriage, birth, adoption or placement for adoption, you may be able to enroll yourself and your dependents. However, you must request enrollment within the time specified by your employer after the marriage, birth, adoption, or placement of adoption. Additionally, you must enroll within the time specified by your employer after you lose eligibility for coverage under Medicaid or CHIP or become eligible for Medicaid or CHIP premium assistance.

Please note that if you or your dependents are not covered by minimum essential coverage, you may be responsible for individual shared responsibility payments when filing your federal income tax return. Also, by declining the coverage offered by your employer, you or your dependents may not be eligible for Marketplace coverage subsidies.

To request special enrollment or obtain more information, refer to your Summary Plan Description (SPD), coverage manual, other benefit documents, or contact your employer.

Employee Name (First, Last)	Social Security Number
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**I. Authorization and Certification**

I certify that I am legally authorized to apply for coverage for myself and all other persons named in this application. I understand that I am making application for the coverage sponsored by my employer or group sponsor and offered by Wellmark, Inc., doing business as Wellmark Blue Cross and Blue Shield of Iowa, or Wellmark Health Plan of Iowa, Inc. (each referenced herein as "Wellmark").

I certify that, after this application was completed, I carefully and fully read it, that the statements and answers set forth are full, true, and correct to the best of my knowledge and belief, and that no information required to be given, either expressly or by implication, has been knowingly withheld. I understand that my employer or group sponsor will rely on the completeness and truthfulness of the information given and the statements made, and that if I have made any false statements or misrepresentations, or have failed to disclose or concealed any material fact, my employer or group sponsor is entitled to declare the contracts applied for void and to refuse allowance on benefits to any person thereunder. I understand and grant authorization for my employer, group sponsor, consultant, or Wellmark agent to electronically submit the information provided by me on this signed application for enrollment purposes.

I acknowledge I have received or have been advised and understand I will receive from my employer the Summary of Benefits and Coverage (SBC).

**Providing Social Security Numbers or Tax Identification Numbers**

In order for Wellmark to report my coverage status to the federal government, I understand I must provide to Wellmark my Social Security number or tax identification number and the Social Security numbers or tax identification numbers of all members covered under my coverage. The IRS requires that Wellmark report this information using the Social Security number or tax identification number of the plan member and each dependent. If Wellmark does not have Social Security or tax identification numbers, I understand that Wellmark will be unable to report and send the information needed to complete federal tax returns. If I have not previously provided Social Security numbers or tax identification numbers to Wellmark for all members covered under my coverage, I will contact Wellmark by calling the Customer Service number on my ID card. If I do not provide the Social Security numbers or

taxpayer identification numbers to Wellmark for this purpose, I may be subject to a \$50 penalty per violation imposed by the Internal Revenue Service.

**HSA Coverage**

In the event I have selected a High Deductible Health Plan, I understand that enrolling in such coverage does not guarantee that I am or will be eligible to make contributions to an HSA or that contributions can be made to an HSA on my behalf.

**Release of Medical Information**

I authorize any health care provider, including but not limited to; surgeon, physician, psychologist, nurse, social worker, or health care facility to release to Wellmark all health and mental health records, including those records protected by Federal or State law relating to AIDS or AIDS related complex, mental health and substance abuse, the past, present, or future treatments or conditions for myself or for my dependents eligible for health care coverage. I understand that I have the right to revoke this authorization in writing at any time by delivering such written notification to the requestor. I understand that a revocation is not effective until received by the requestor. I further understand that any revocation is not effective to the extent that Wellmark or Provider have relied on it in the use or disclosure of protected health information.

This form does not authorize the redisclosure of medical information. Federal and State regulations do not allow further disclosure of mental health, substance abuse and AIDS/HIV related information. Wellmark maintains the confidentiality of all information received and it will not be released to any person or facility.

The protected health information described above may be disclosed to and/or received by persons or organizations that are not health plans, covered health care providers or health care clearinghouses subject to federal health information privacy laws. They may further disclose the protected health information, and it may no longer be protected by federal health information privacy laws.

I understand that I have the right to refuse to sign this authorization, but that Wellmark will then have the right to condition eligibility determination and enrollment on the receipt of this signed authorization.

**I have read and understand the Important Information Regarding Waiver of Enrollment and Authorization and Certification language on this application and acknowledge receipt of a fully completed copy of this application.**

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