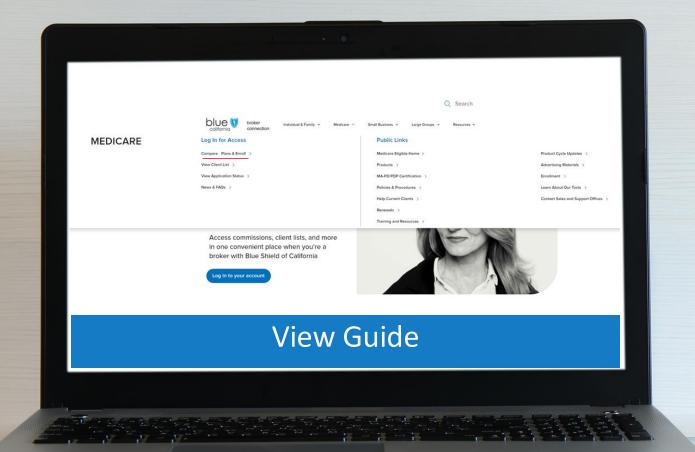
# Blue Shield Medicare Enrollment Site Reference Guide



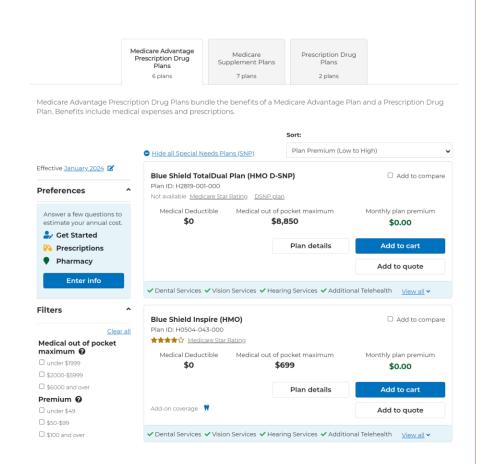
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Quick Reference Guide

Our Online Enrollment system serves two basic purposes:

- Enrolling beneficiaries in Medicare and Medicare Supplement plans.
- Helping beneficiaries estimate their out-of-pocket expenses for each plan including their health, prescriptions, pharmacy, and the amount of coverage the plan offers.

Using this system, you will be able to enter all the beneficiary's information, compare plans, and enroll.



#### Questions?

Page Navigation

Contact US:

Blue Shield Producer Services
Phone Number:

1-800-559-5905

Overview

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### What's New for 2024

- Broker Site: Multi-year site
- Broker: Single link to access the Compare & Enroll site
- Consumer Profile: Addition of mobile phone number field & CA license number
- Consumer Profile: Separate section for MBI, Part A Effective Date, and Part B Effective Date fields
- Consumer Profile: Dedicated Consumer Enrolment history page.
- · Quoted history display
- Broker Profile: Addition of extension number (if applicable)
- Plan cards display: Addition of on card benefits, addition of contract ID's
- Personal URL: Single URL for all future sites (Not applicable this year)
- Medicare enrollment form: Change in flow.
- NEW! Online HRA form

### **Enrollment Begins**

This year Medicare Enrollment Site for Medicare Annual Enrollment Period begins on October 15, 2023.



Login

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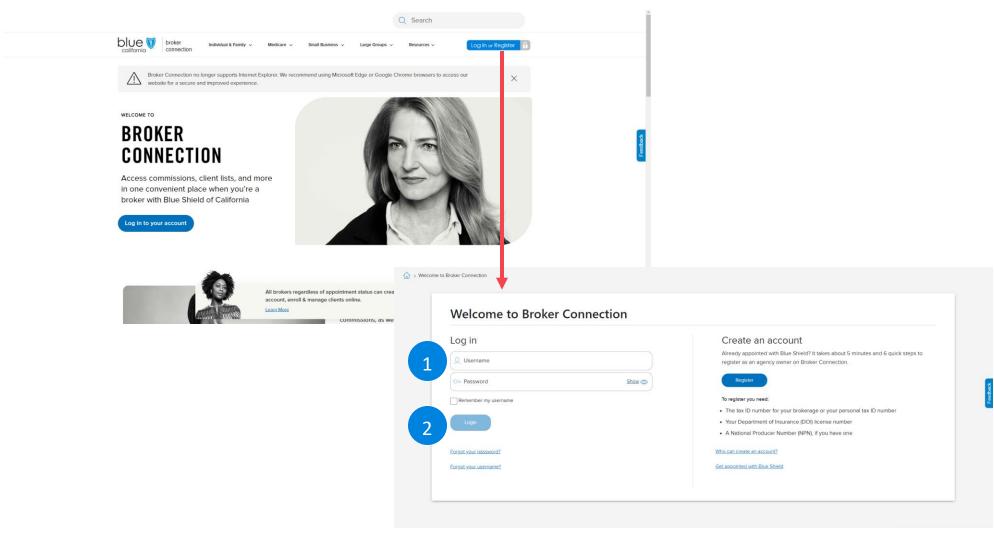
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**Broker Login** 

Quick Reference Guide



#### Log In Steps

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- 1. 1. Enter your **username** and **password.**
- 2. Click **Log In button.**

For captive agents, there is an additional link dropdown. Agents must choose the correct link to receive credit for the sale.

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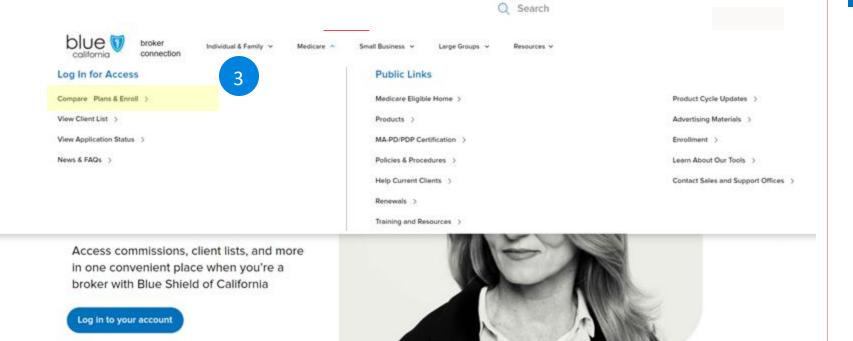
Page Navigation



# **Broker Login**



Quick Reference Guide



### Log In Steps

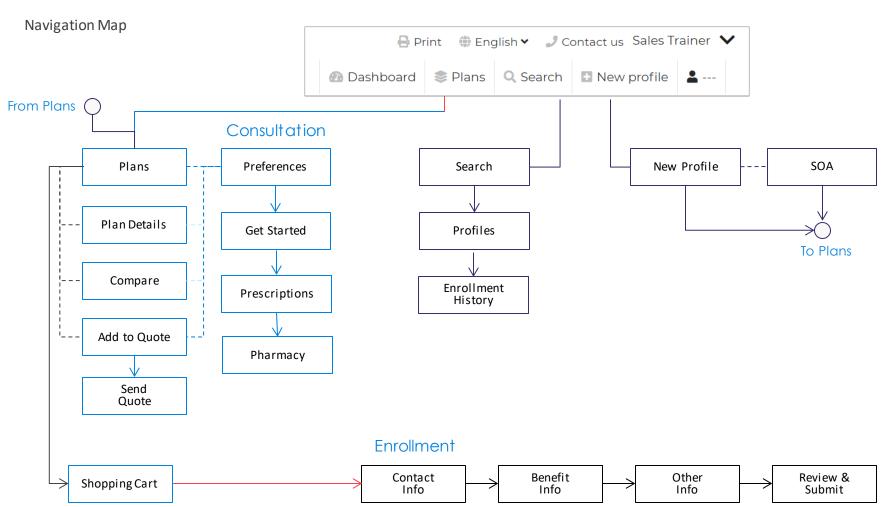
3. Click the Compare Plans & Enroll link.

#### NOTE:

From October 1st onwards there will be just one compare plans & enroll link

# Site Navigation

Quick Reference Guide



Login

Page Navigation





Use the site flow diagram as a reference guide to navigating through the site

When you login to the site, you will be on the Dashboard page. The Dashboard is your home page that provides a snapshot of your activity.

There are three main areas within the site:

- 1. Plans
- 2. Search Profiles & Enrollment
- 3. New Profile

The diagram shows the associated screens for each area.

#### NOTE:

- Dotted lines indicate access to supporting site pages for the main screens.
- Sold arrow lines indicate typical process flow a person would follow during an enrollment.

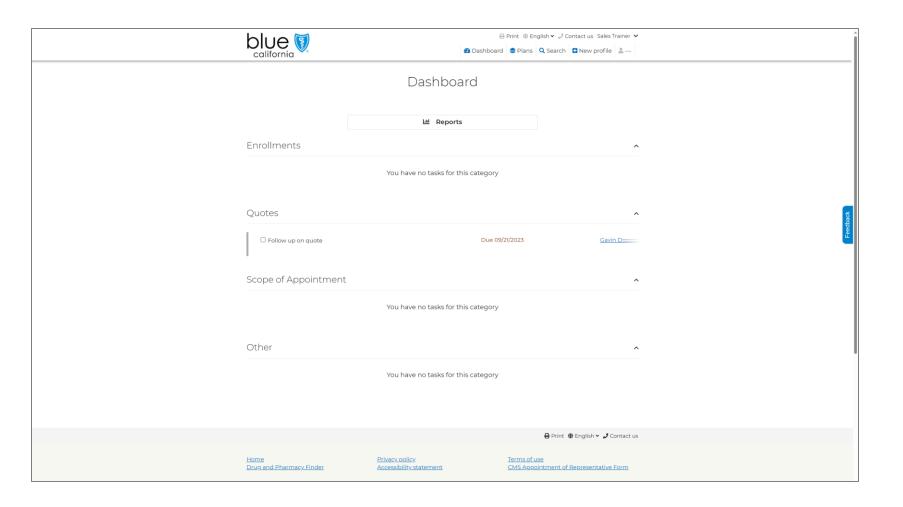
Login

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Page Navigation



# When you login to the site, you will be on the Dashboard Screen



#### Dashboard Overview

The dashboard provides an overview of your sales activities including:

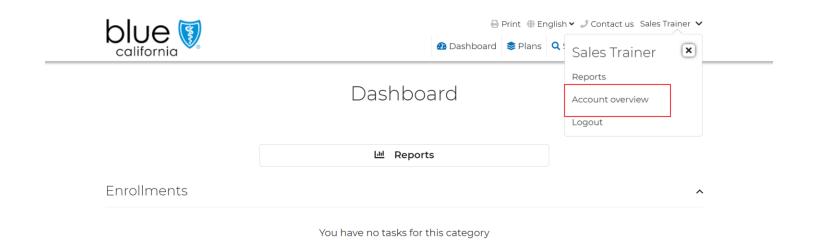
- In process enrollments
- Completed applications
- Quotes to follow up on

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Page Navigation



### **Account Overview**



#### Personal Sales Link

The **Account Overview** screen provides your personalized link.

Share this link with your clients to get them started shopping for plans.

You will get credit for the sale if your client enrolls in any of the plans you are authorized to sell.

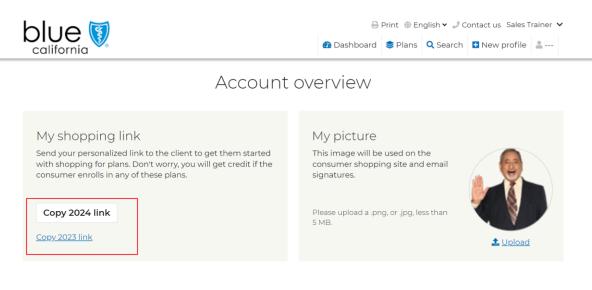
Resources

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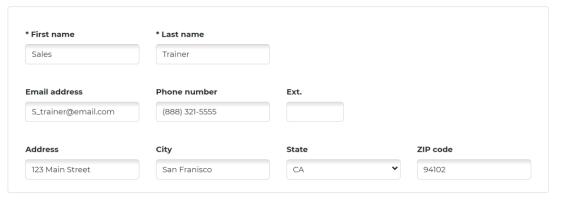
Page Navigation



### **Account Overview**



#### Personal information



Save

#### Personal Sales Link

It's important to confirm your information including the NPN to ensure that you get credit for the sale.

You can make changes to the some of the fields and click the **Save** button to update the information.

#### Fields you can edit include:

- Name
- Email
- Phone number
- Address
- Agency ID
- Agency name
- CA License number

#### Note:

In 2024 the Personal Shopping links are going to be one link only.

Login

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es & Drug ts

Drug and Pharmacy Finder

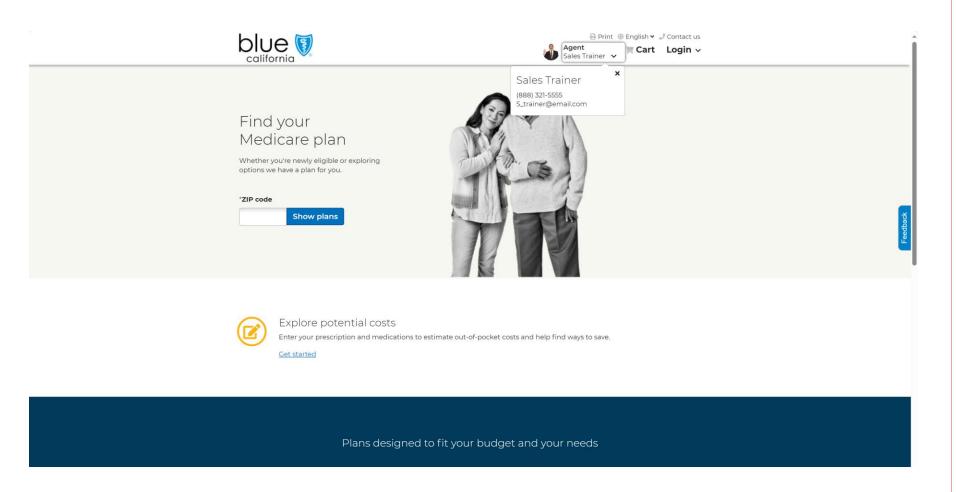
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# Site Navigation

Quick Reference Guide



### Personal Link Page

When the prospect clicks your personal link, they will see your name, email, and image at the top of the page.



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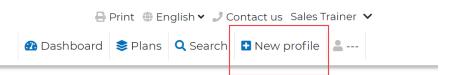
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Page Navigation



### Add Client





Dashboard

#### Create a Profile

Select **New Profile** to create a new beneficiary profile. Creating a profile will allow you to search and return to view all information related to this beneficiary record in the future.

Add Client

New Fields

Medicare Number

• Hospital (Part A) effective Date

• Medical (Part B) effective date

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Profile

Enter info > Continue to SOA

Login

#### Personal information SOA You have no SOAs for this profile \*ZIP code Notes Date of birth \* Last name First name MM/DD/YYYY You have no notes for this profile **Email address** Primary phone number Mobile phone number Add note Same as primary Tasks Home address You have no tasks for this Address 1 Address 2 profile Add task City State Sales information Is the sales contact different from the beneficiary? No Yes Save Eligibility Add/Edit subsidy A Hospital (Part A) effective \* Medical (Part B) effective Does beneficiary receive extra help paying for prescription drugs? (Optional) Medicare Number Month ✔ Year ✔ Month ✔ Year ✔ I receive help from Medicaio I get supplemental security income I belong to a Medicare Savings Program (MSP) Add/Edit subsidy I applied and got full help through social security I applied for and got partial help through social security No, I am not eligible for special assistance I don't know

Continue to plans

#### Create a Profile

Page Navigation

- 1. Begin by entering the beneficiary information sections:
  - Personal Information
  - Home Address
  - Sales Information
  - Eligibility
- 2. Add **Notes or Tasks** to the profile.
- 3. Click Save.
- 4. Click **SOA** to move to the Scope of Appointment screen.

#### NOTE:

Fields with an asterisk are required.

The new fields will only validate the correct format, **NOT** the accuracy of the MBI or the effective dates.

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Overview

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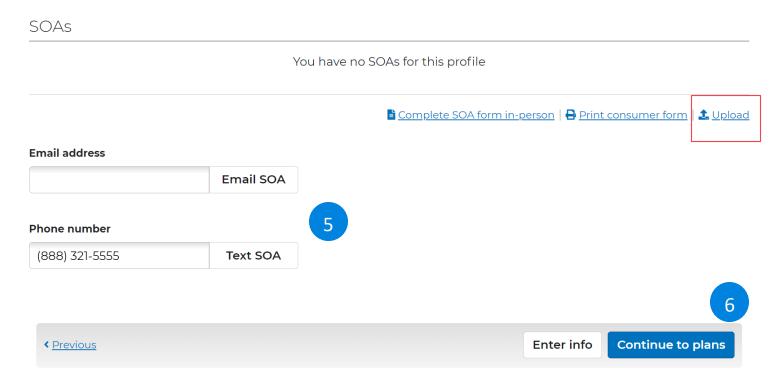
Page Navigation



# Scope of Appointment

# Scope of Appointment

A Scope of Appointment (SOA) is needed for all sales appointments and required 48-hours in advance with limited exceptions. Submit the SOA once you have received it from the beneficiary.



#### SOA - Email

Electronically capture & store Scope of Appointment (SOA) confirmation.

- Complete the Email or Text option to send the SOA to yourself or the beneficiary.
- 6. Click Continue to plans.

#### **NOTE:**

- The agent receives confirmation that beneficiary has signed their SOA.
- The beneficiary receives confirmation SOA has been submitted.
- You can upload a copy of the SOA using the upload button.

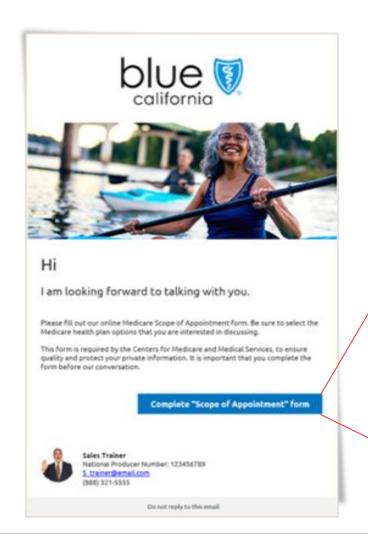
Resources

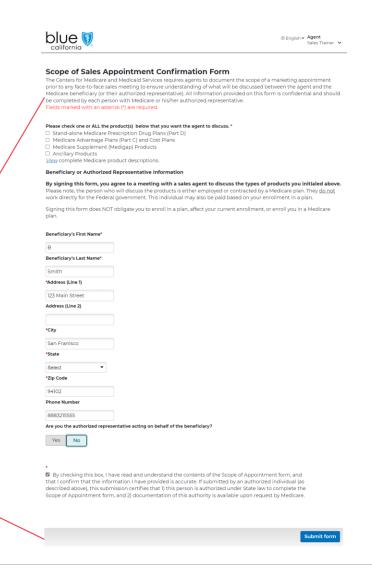
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# Prospect SOA Email





#### SOA - Email

The beneficiary will receive an email or text with a link.

When they click the link, they are taken to the Scope of Appointment form.

When they complete form, you will receive an email notification.

#### **NOTE:**

Brokers will receive a notification when the SOA is received, and can click on the notification to be taken directly to Blue Shield of California Medicare Enrollment Site, if they are already logged in.

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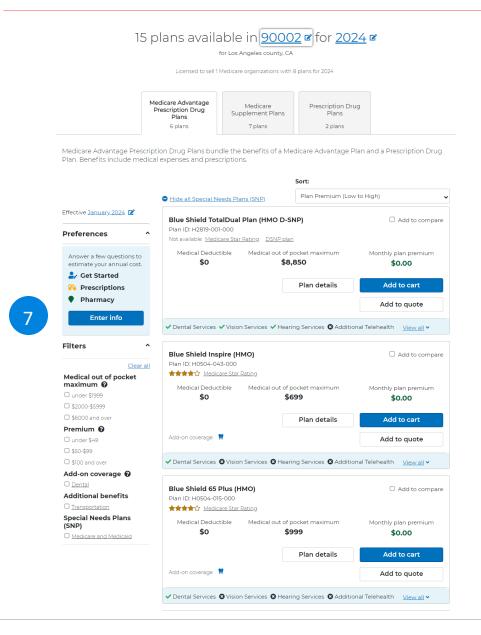
Resources

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Page Navigation



### **Start Consultation**



#### **Preferences**

Guided Help gives agents and beneficiaries the option of adding preferences for a more personalized shopping experience, along with the ability to see the most accurate cost estimates for every plan option.

From the **Get Started** page, the following can be added:

- Prescriptions
- Pharmacy
- 7. Select the **Enter Info** option to start the consultation.

Overview

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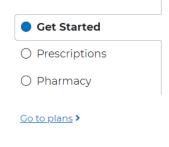
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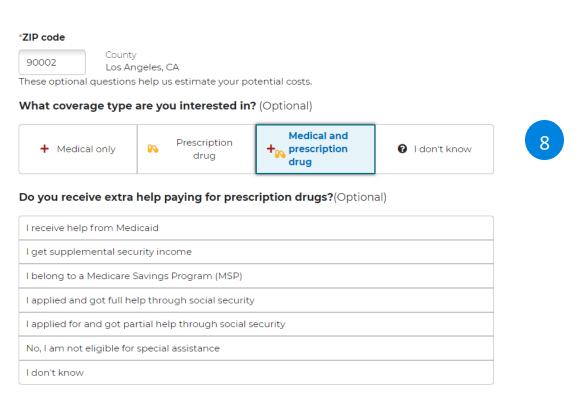
Page Navigation

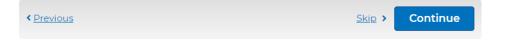
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### **Start Consultation**









#### Get Started

- 8. Add what type of coverage the beneficiary is interested in.
- 9. Click Continue.

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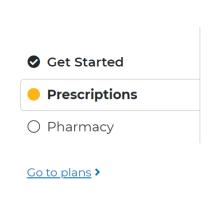
Drug and Pharmacy Finder

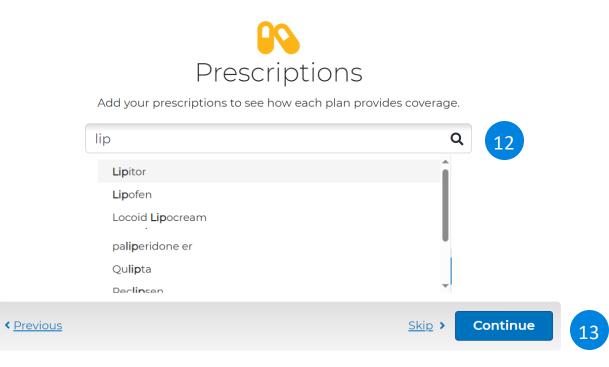
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### **Start Consultation**





### Prescription

- 12. Add prescriptions to see how each plan provides coverage.
- 13. Click Continue.

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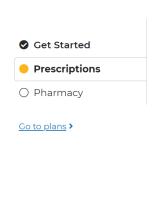
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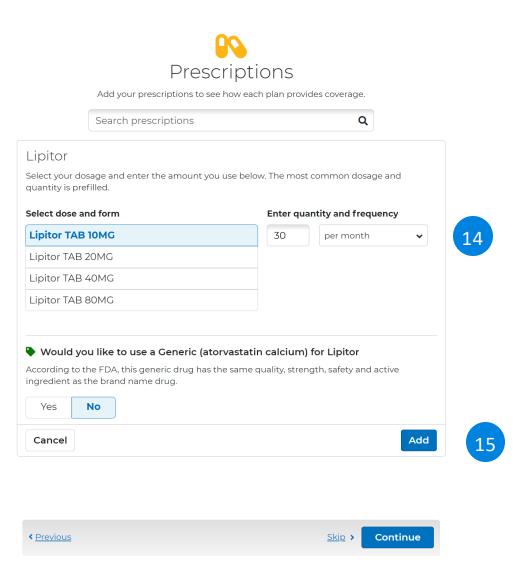
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Page Navigation



# **Start Consultation**





### Prescription

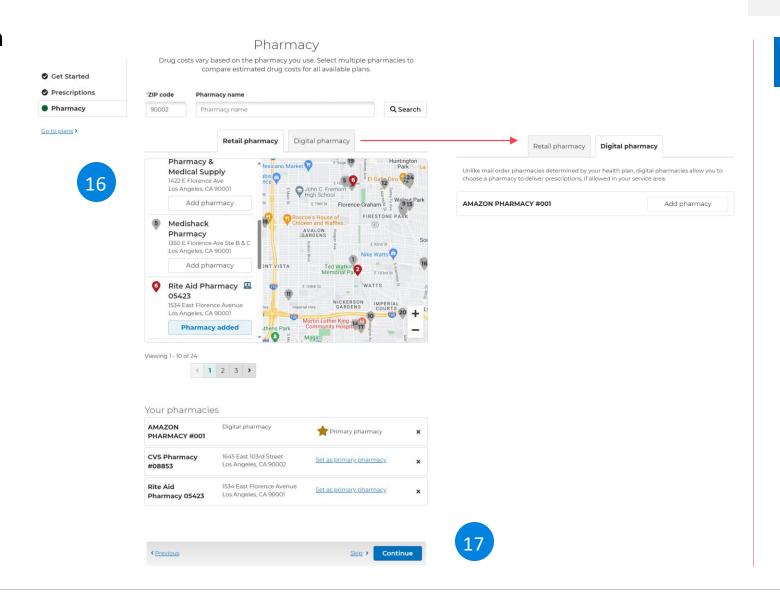
- 14. Select the dose, form, and quantity. Indicate the generic preference, if available.
- 15. Click Add to continue.

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### **Start Consultation**



### Pharmacy

16. Add the beneficiary pharmacy preference.

You may add both retail and digital pharmacies to your list.

17. Click Continue.

Overview

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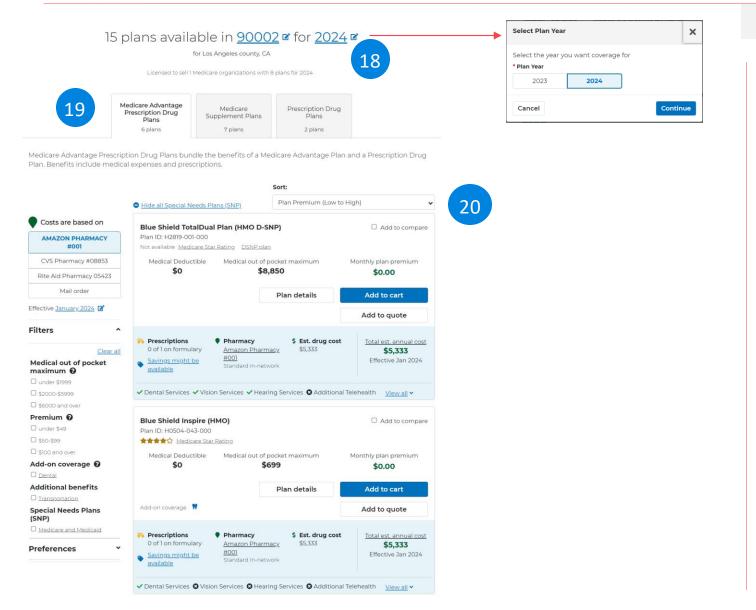
Drug and Pharmacy Finder

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Resources

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### **Start Consultation**



### Plans

Page Navigation

Available plans are shown for the beneficiary's zip code.

- **18. Select the plan year** you want coverage for.
- **19. Select the tab to** view available plans by type
  - Medicare Advantage Prescription Drug Plans
  - Prescription Drug Plans
  - Medicare Supplement Plans
- 20. Sort the plans by:
  - Plan Premium (low to high)
  - Total Estimated Cost
  - Estimated Drug Costs (Low to High)
  - Medicare Star Ratings
  - Plan Name (A –Z)
  - Max Out of Pocket (Low to High)

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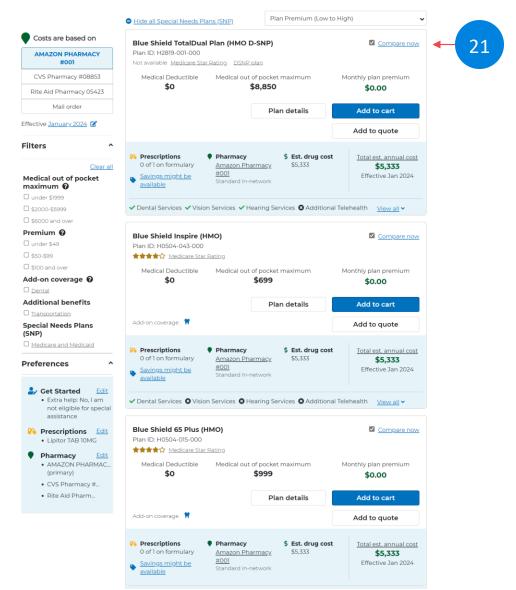


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Finder

# Page Navigation

### Start Consultation



### Compare Plans

Select up to three plans to compare side-by-side.

21. Check the box for each plan that you want to compare and click Compare Now to view the results.

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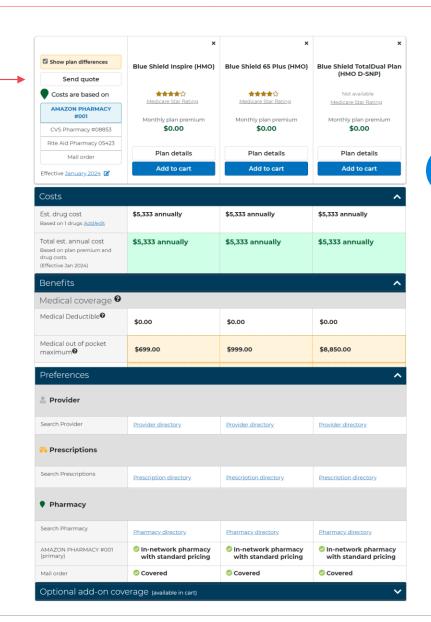
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Page Navigation



### **Start Consultation**





Expand each section to view the information for each plan side-by-side.

In the Preferences section, you can search for:

- Provider
- Prescriptions
- Pharmacy's

From this page, you can:

- 22. Send a quote.
- 23. Add a plan to the shopping cart.

#### NOTE:

Differences between plans are highlighted in orange.



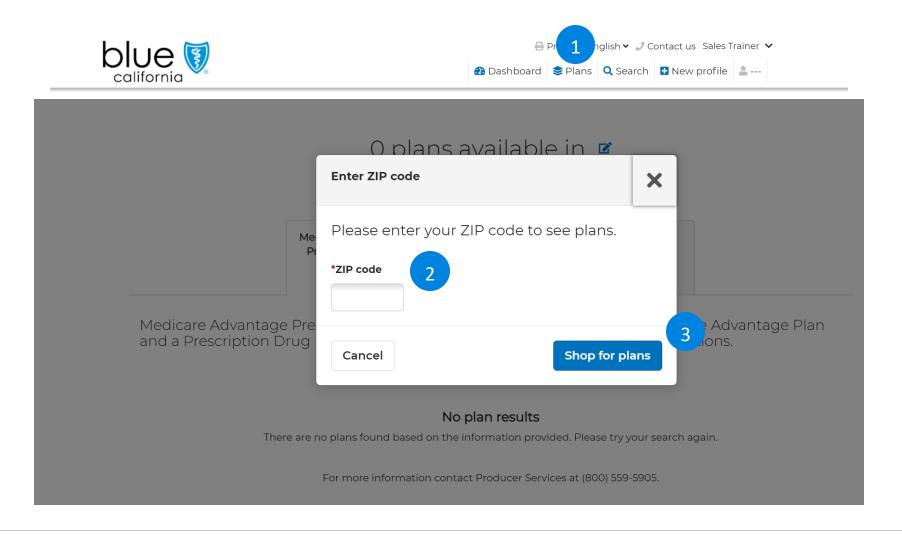
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#### Page Navigation



# **Quick Quote**

Quick Reference Guide



### Plans

Available plans are shown for the beneficiary's zip code.

- 1. Select **Plans** from the menu bar.
- 2. Select the **Edit Zip Code** button.
- 3. Enter the zip code and click **Shop for Plans** to continue.

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### Quick Quote

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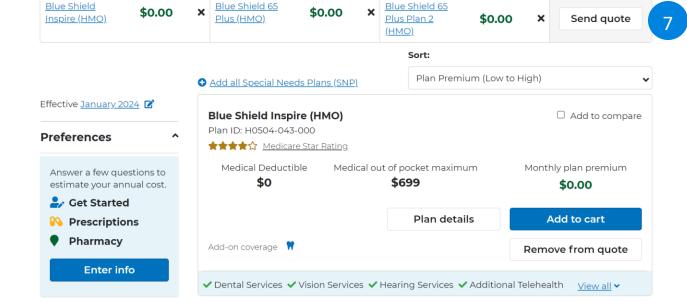
for Los Angeles county, CA

Licensed to sell 1 Medicare organizations with 8 plans for 2024

Medicare Advantage Prescription Drug Plans 5 plans

Medicare Supplement Plans 7 plans Prescription Drug Plans 2 plans

Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions.



#### Plans

The plans that you selected are shown at the top.

7. Click **Send quote** button.

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Drug and Pharmacy Finder

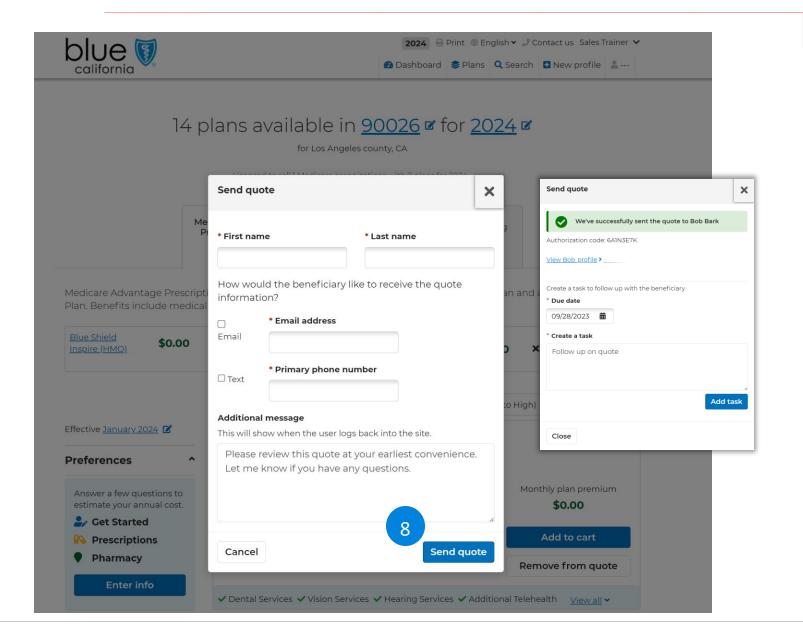
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Quick Quote

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Send Quote

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Complete the form and select how you want to send the quote via email or text by checking the box.

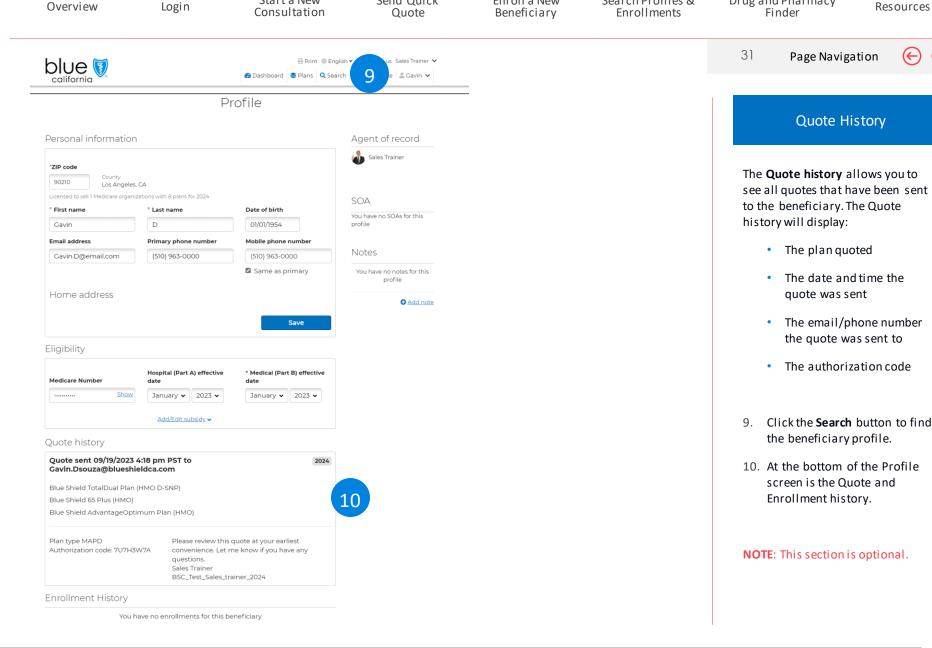
8. Click **Send quote** button.

You will receive a confirmation that the quote was sent.

You can also create a task to follow up with beneficiary.

To dismiss the confirmation window, click the close button to return to the plans list.

# **Quote History**



Send Quick

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**Quote History** 

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Start a New

# Medicare Supplement Plans

View Section

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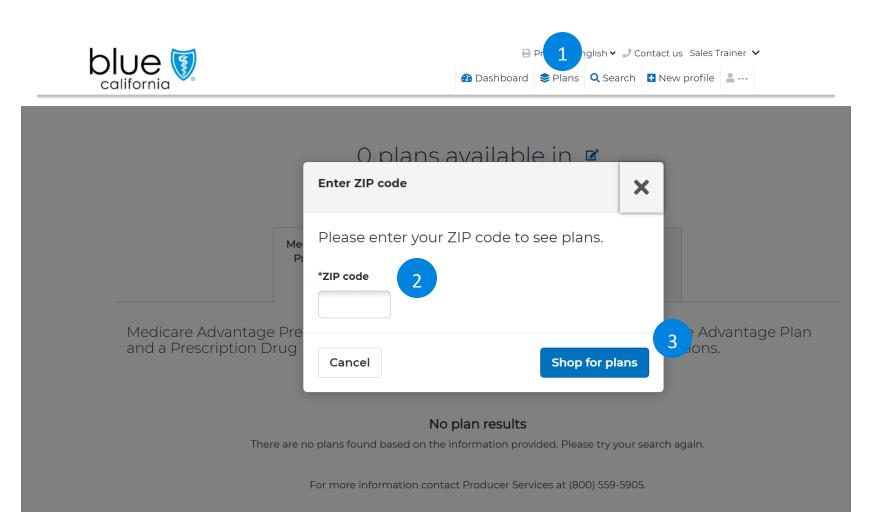
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**Quick Quote** 

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#### Plans

Page Navigation

Available plans are shown for the beneficiary's zip code.

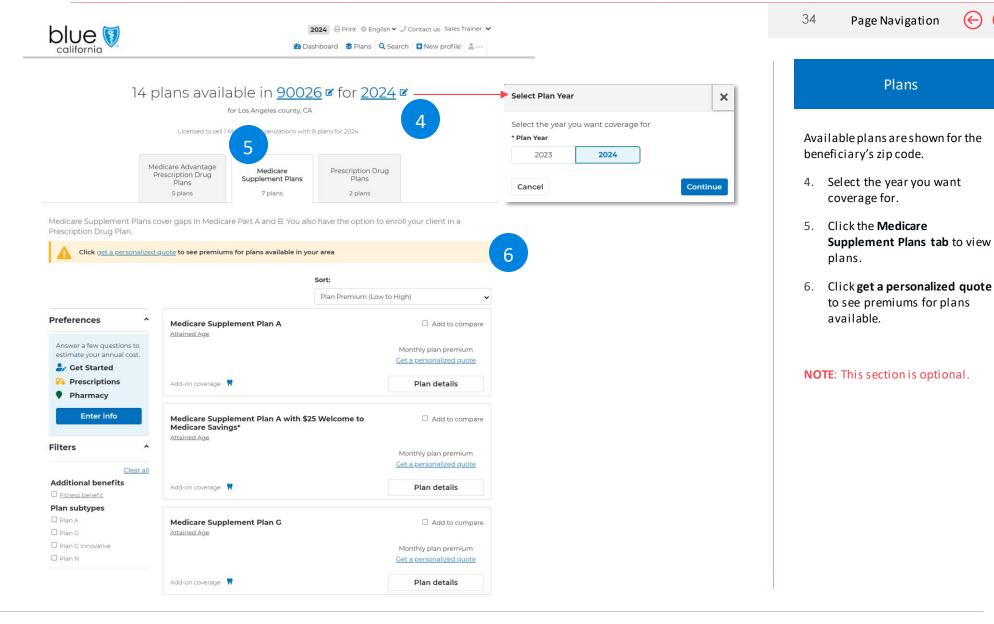
- 1. Select **Plans** from the menu bar.
- 2. Select the **Edit Zip Code** button.
- 3. Enter the zip code and click **Shop for Plans** to continue.

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# **Quick Quote**

Quick Reference Guide



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## Quick Quote

Quick Reference Guide



### Medicare Supplement Information

The information you provide below will be used to calculate your Medicare Supplement plan premium. Rates are determined based on your age at the time of your plan effective date.

To qualify for the \$25 monthly savings for the first 12 months of enrollment, you must be 65 years or older and Blue Shield must receive your application no later than six months from your original Medicare Part B effective date.





# Medicare Supplement Information

The information you provide below is used to calculate the beneficiaries Medicare Supplement plan premium.

Rates are determined based on beneficiaries age at the time of their plan effective date.

7. Complete the form and click **Continue to plans**.

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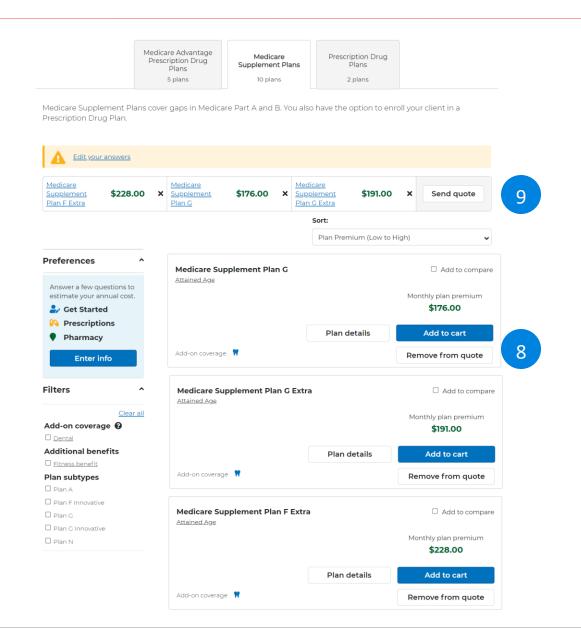
Enroll a New Beneficiary Search Profiles & Enrollments Drug and Pharmacy Finder

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**Quick Quote** 



Plans

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Available plans are shown for the beneficiary's zip code with their monthly plan premium.

8. Click the **Add to quote** button.

The quotes are shown at the top of the screen.

9. Click Send a Quote button.

Blue Shield of California Medicare

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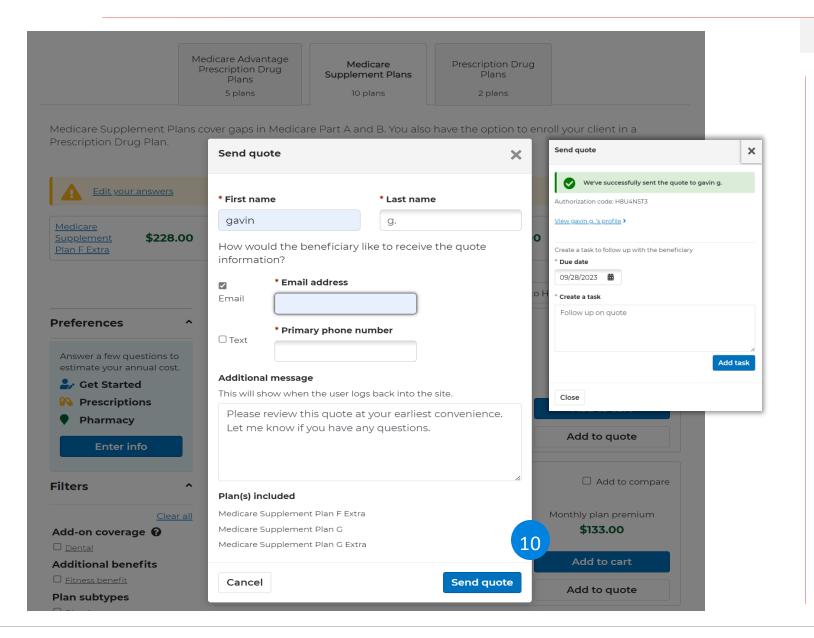
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Quick Quote

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Send Quote

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Complete the form and select how you want to send the quote via email or text by checking the box.

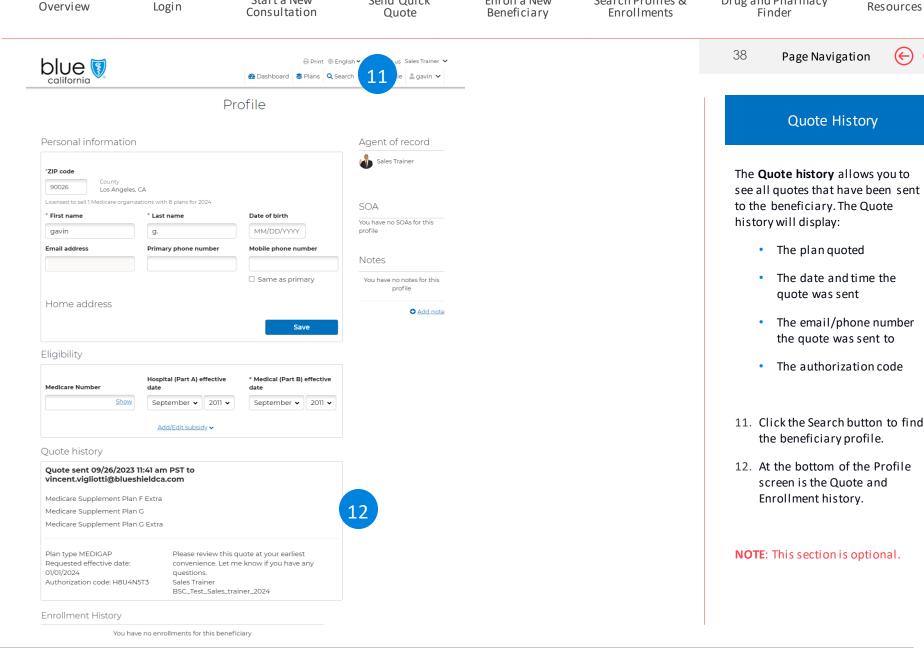
10. Click Send quote button.

You will receive a confirmation that the quote was sent.

You can also create a task to follow up with beneficiary.

To dismiss the confirmation window, click the close button to return to the plans list.

## **Quote History**



Send Quick

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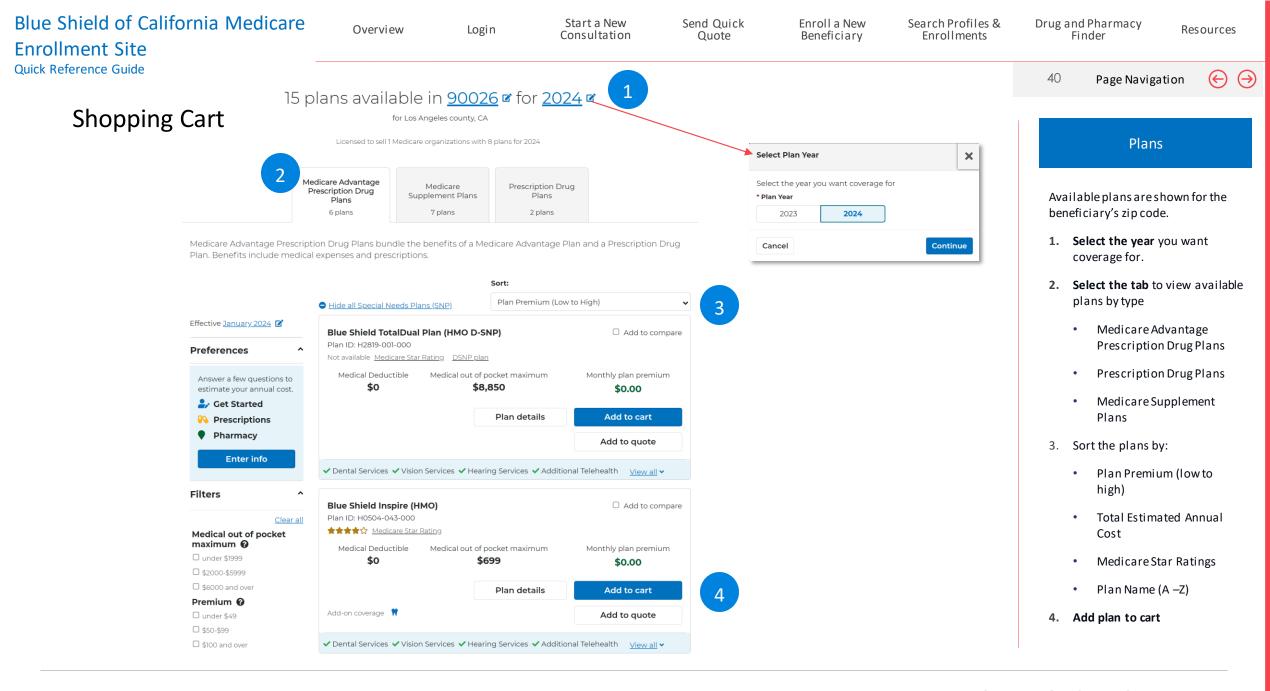
Drug and Pharmacy

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Start a New





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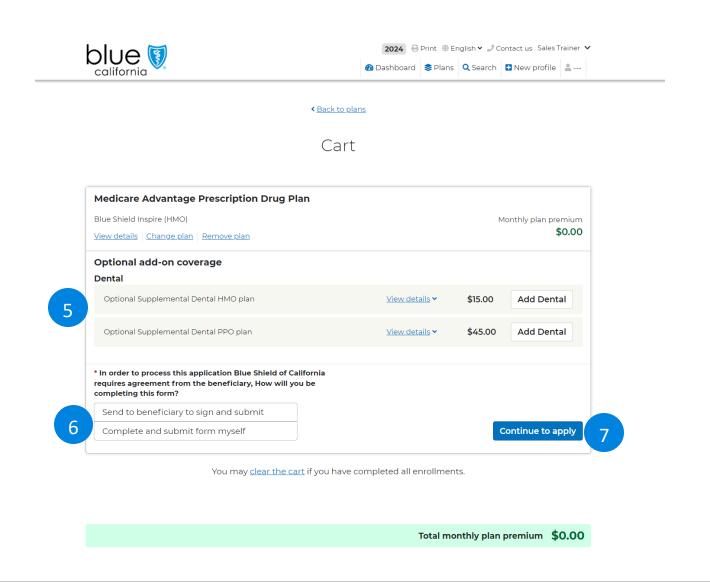
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## **Shopping Cart**



### Add to Cart

5. Add any optional add-on coverage.

You can only add optional coverage in the Cart screen.

- 6. Select how you will complete this form:
  - Send to beneficiary to sign and submit
  - Complete and submit form yourself
- 7. Click the **Continue to apply** button.

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## **Shopping Cart**



- Important: To join a Medicare Advantage Plan, you must also have both:
- Medicare Part A (Hospital Insurance)

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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 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

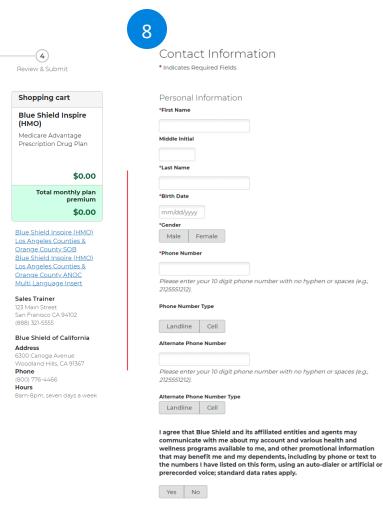
Note: You must complete all fields that are marked with an asterisk (\*). Some items are optional. You cannot be denied coverage because you don't fill them out.

#### 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. For more information, see Paying Your Plan Premium section on the Review & Submit page of this application.

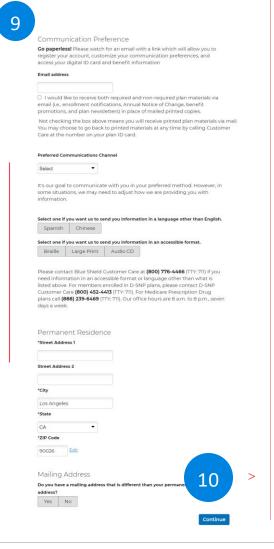
#### Individuals experiencing homelessness

If you want to join a plan but have no permanent residence, a Post Office Box, an address of a shelter or clinic, or the address where you receive mail (e.g., social security checks) may be considered your permanent residence address.



Participation is voluntary and you can opt-out at any time, for more

information visit blueshieldca.com/terms



### **Contact Information**

There is a 4-step process to completing the enrollment.

#### Step 1- Contact Info

- 8. Complete the Contact Information sections:
  - Personal Information
  - Permanent Residence
- 9. Continue down the page to complete the Contact Information sections:
  - Mailing Address
  - Email Consent

### Option Fields:

- Ethnicity & Race
- Language options
- Accessible format materials
- 10. Click **Continue** to go to Step 2.

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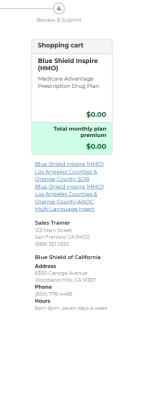
## **Shopping Cart**



mm/dd/yyyy

I got this status on @

☐ I recently obtained lawful presence status in the United States.







Previous

### **Benefit Information**

There is a 4-step process to completing the enrollment.

#### Step 2- Benefit Info

- 11. Complete the Benefits Information sections:
  - Medicare Number
  - Prescription Drug Coverage
  - Medicaid Enrollment
- 12. Click **Continue** to go to Step 3.

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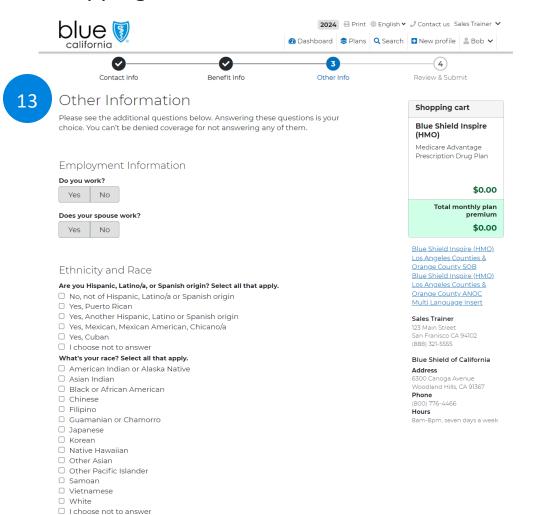
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## **Shopping Cart**

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### Physician Selection Use Find A Doctor to locate your primary care physician Once you've made your selection, click on the "Make PCP" button under your chosen doctor's name and then confirm your selection by clicking the "Choose for primary care" button. The doctor's name and ID number will automatically be populated in the fields below \*Physician Name or Clinic Name \*Physician ID # Physician Group Name: \*Current Patient? Yes No Producer Information (Broker Use Only) FMO/Agency Name BSCA\_Test FMO/Agency ID XXXXXXXXXXXX This info has been hidden for security purposes. Producer First Name Sales Producer Last Name Trainer Producer ID XXXXXXXXXX This info has been hidden for security purposes National Producer Number 123456789 > For auditing, Brokers please retain copy of the paper application. Continue Previous

### Other Information

#### Step 3- Benefit Info

- 13. Complete the Other Information sections:
  - Employment Information
  - Physician Selection
  - Producer Information
  - Special Supplemental benefits for the Chronically III (SSBCI) – Blue Shield Inspire (HMO) and Blue Shield Inspire (HMO D-SNP)
- 14. Click **Continue** to go to Step 4.

**NOTE:** Physician information can be added manually.

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#### Review and Submit

Review your application

**Ouick Reference Guide** 

You may review your answers to the application by expanding each section below and make updates if needed. After you review, in the Important Information section below, check the acknowledgement that you have reviewed the information. Then indicate who is submitting this form and click the Submit button at the bottom of the page.

#### Who can use this form?

People with Medicare who want to join a Medicare Advantage 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 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 fields that are marked with an asterisk (\*). Some items are optional. You cannot be denied coverage because you don't fill them out

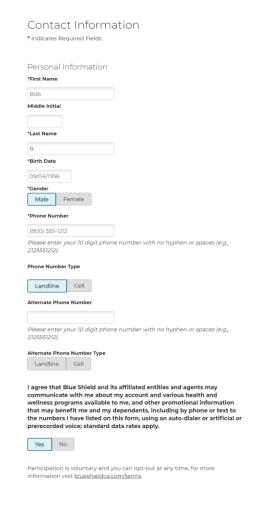
#### Reminders:

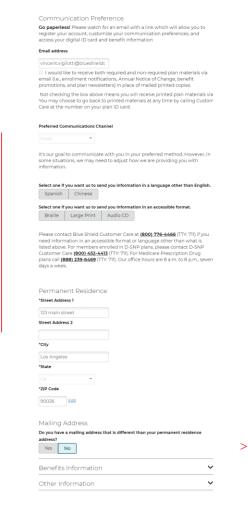
- If you want to join a plan during fall open enrollment (October 15-December 7), the plan must get your completed form by December 7.
- · Your plan will send you a bill for the plan's premium. You can choose to sign up to have your premium payments deducted from your bank account or your monthly Social Security (or Railroad Retirement Board) benefit. For more information, see Paying Your Plan Premium section on the Review & Submit page of this application

#### Individuals experiencing homelessness

If you want to join a plan but have no permanent residence, a Post Office Box, an address of a shelter or clinic, or the address where you receive mail (e.g., social security checks) may be considered your permanent residence address.







### **Review & Submit**

Complete the application.

Step 4 - Review & Submit

- 15. Complete the Review and Submit sections:
  - Expand each section to view and verify the information.
  - Correct or complete any fields that require revision.
  - Scroll down the page to complete the Review and Submit sections.

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## **Shopping Cart**

IMPORTANT: Read and sign below:

I Bob Bark understand(s) that:

- I must keep both Hospital (Part A) and Medical (Part B) to stay in Blue Shield Inspire (HMO).
- By joining this Medicare Advantage Plan, I acknowledge that Blue Shield Inspire (IHMO) 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.
- I understand that I can be enrolled in only one MA or Part D plan at a time - and that enrollment in this plan will automatically end my enrollment in another MA or Part D plan (exceptions apply for MA PFFS, MA MSA plans).
- 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 when my Blue Shield Inspire (HMO) coverage begins, I
  must get all of my medical and prescription drug benefits from Blue
  Shield Inspire (HMO). Benefits and services provided by Blue Shield
  Inspire (HMO) "Evidence of Coverage" document (also known as a
  member contract or subscriber agreement) will be covered. Neither
  Medicare nor Blue Shield Inspire (HMO) will pay for benefits or services
  that are not covered.

#### \*What is your relationship to the person enrolling in this plan?

I am (or am helping) the person enrolling
I am an agent or authorized person



- ☐ 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:
- This person is authorized under State law to complete this enrollment, and
- 2. Documentation of this authority is available upon request by Medicare.

#### Volunteer / Authorized Individual

If you have been authorized to fill out this form on behalf of another individual, under the laws of the State where that individual resides, you must provide the following information. Upon request, you must be able to present Blue Shield of California and/or Medicare with documentation of your authority to represent the individual listed on this application.

ate			
ate			
ate	Address		
ate			
P ▼	City		
P ▼			
P	State		
	Select	-	
none Number	ZIP		
none Number			
	Phone Number		
	Phone Number		

Please enter your 10 digit phone number with no hyphen or spaces (e.g., 2125551212).

\*\*Pelationship to Forollee\*\*

tionship to Enrolle

Authorized Individual Signature

\*Please sign your name in the space below using your mouse, stylus, or finger.

		clea
		Cies

- ☐ 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:
- This person is authorized under State law to complete this enrollment, and
- 2. Documentation of this authority is available upon request by Medicare.

#### Paying Your Plan Premium

You can pay your monthly plan premium (including any late enrollment penalty you currently have or may owe) by mail each month. If your plan has a premium due, you will receive a monthly bill including the amount and the date of when your next payment is due, or you may choose to pay your premium by having it automatically taken out of your Social Security or Railroad Retirement Board (RRB) benefit each month.

To learn more about your payment options, visit us at blueshieldca.com/medicarewaystopay or call Customer Care at 800-776-4466 (TTY: 711). For members enrolled in D-SNP plans, please contact D-SNP Customer Care 807-452-4413 (TTY: 711). For Medicare Prescription drug plans 888-239-6469.

Electronic funds	s transfer (EFT) from your bank account each month
Credit Card	
Get Monthly Bill	
Automatic dedu	action from your monthly Social Security or Railroad
Retirement Boa	rd (RRB) benefit check.

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 Blue Shield of California the Part D-IRMAA.

#### PRIVACY ACT STATEMENT

The Centers for Medicare & Medicaid Services (CMS) collects information from Medicare plans to track beneficiary enrollment in Medicare Advantage (MA) and Medicare 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 § 42250 and 4226 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 plans.

← Previous
Send to beneficiary

### Review & Submit

Step 4 - Review & Submit

- 16. For the question: "What is your relationship to the person enrolling in this plan?"
  - Select "I am (or am helping) the person enrolling" if you have the Power of Attorney (POA).
  - Select "I am an agent or authorized person" if you are the Broker/Agent.
- 17. Click **Send to Beneficiary** to sign.
- 18. Complete the form and select the method of sending the application to the beneficiary by selecting a check box (you can select multiple boxes). Click Send Application.

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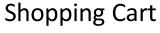
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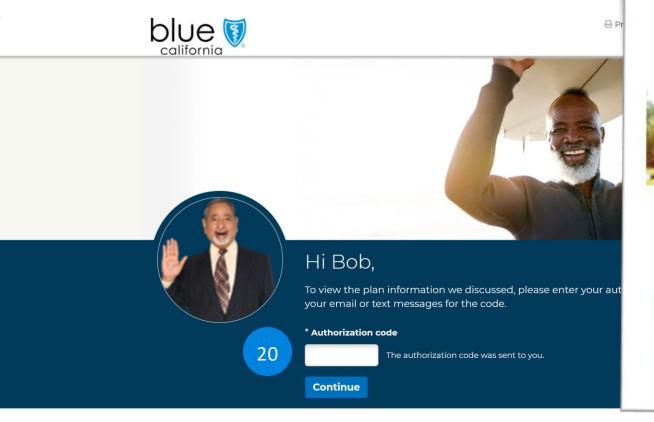


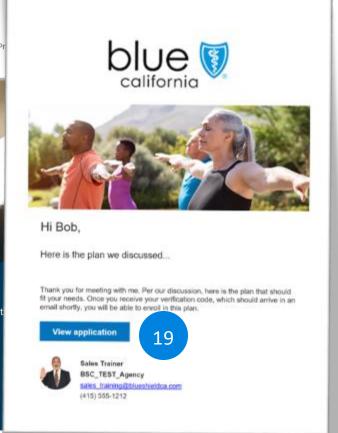
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### Beneficiary **Review & Submit**

19. The beneficiary will receive an email or text with a link.

> When they click the link, they are taken to application to sign and submit.

20. The beneficiary will also receive a second email with the authorization code to access the application.



Meet with Sales Trainer

(888) 321-5555 S\_trainer@email.com

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## **Shopping Cart**

Visit Medicare.gov to learn more about when you can sign up for a plan.

. Your Medicare Number (the number on your red. white, and blue

Note: You must complete all fields that are marked with an asterisk (\*). Some

items are optional. You cannot be denied coverage because you don't fill

. 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

account or your monthly Social Security (or Railroad Retirement Board)

benefit. For more information, see Paying Your Plan Premium section

sign up to have your premium payments deducted from your bank

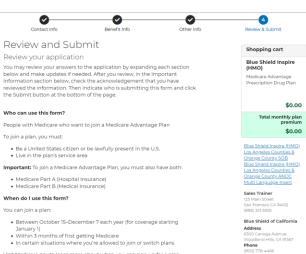
What do I need to complete this form?

Your permanent address and phone number

on the Review & Submit page of this application.

Medicare card)

them out.



Bob B

I am (or am helping) the person enrolling 21 I am an agent or authorized person Beneficiary Signature ☐ Due to physical limitations, I am unable to sign \*Please sign your name in the space below using your

\*What is your relationship to the person enrolling in this plan?

☐ **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,
- 2. Documentation of this authority is available upon request by Medicare.

#### Paying Your Plan Premium

You can pay your monthly plan premium (including any late enrollment penalty you currently have or may owe) by mail each month. If your plan has a premium due, you will receive a monthly bill including the amount and the date of when your next payment is due, or you may choose to pay your premium by having it automatically taken out of your Social Security or Railroad Retirement Board (RRB) benefit each month.

To learn more about your payment options, visit us at blueshieldca.com/medicarewaystopay or call Customer Care at 800-776-4466 (TTY: 711). For members enrolled in D-SNP plans, please contact D-SNP Customer Care 800-452-4413 (TTY: 711). For Medicare Prescription drug plans 888-239-6469

Electronic funds transfer (EFT) from your bank account each month Credit Card Get Monthly Bill Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check.

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### Beneficiary **Review & Submit**

#### Step 4 - Review & Submit

- 21. For the question: "What is your relationship to the person enrolling in this plan?"
  - Select "I am (or am helping) the person enrolling" if you have the Power of Attorney (POA) or the beneficiary.
  - Select "I am an agent or authorized person" if you are the Broker/Agent.
- 22. Click Submit.

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## **Shopping Cart**

Application submitted



A

You may have other coverage in your cart you still need to enroll in. You may clear your cart if you have completed all enrollments.

Continue applying for coverage

Member name

Member address

September 26, 2023

A54262644273464M

Confirmation number

Submitted on

Bob Bark

Application details

123 main street Los Angeles, CA 90026

### Email Print

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Login

### What to expect

#### Confirmation

Within 10 days of enrollment, you will receive a confirmation enrollment letter in the mail. It is also confirmation that Medicare has approved your enrollment

#### Member ID card

You will also receive your member ID card. Keep this with you for all your doctor, hospital, and pharmacy visits.

#### Welcome package

You will receive a package containing important plan documents. This includes instructions about how to access the Evidence of Coverage, drug list, and provider directory.

#### Premium assistance

If you qualify for help, you will receive a Low-Income Subsidy (LIS) letter. Depending on your level of coverage, receiving US means lower prescription drug costs and financial assistance to cover your Part D premium.

#### Complete your Health Risk Assessment HMO, D-SNP members only

If you have enrolled in a D-SNP plan, Blue Shield Care Coordinators will call you within 90 days of enrolling to complete your Health Risk Assessment (HRA) and Care Plan. Completing these tools helps our Care Coordinators individualize your care to meet your needs. You can also complete your HRA by mail or call 1-888-548-5765.

#### Blue Shield of California

6300 Canoga Avenue Woodland Hills, CA 91367 8am-8pm, seven days a week (800) 776-4466 https://www.blueshieldca.com/medicare

### Your pending coverage



Total monthly plan premium \$0.00

#### Continue applying for coverage

#### What's Next:

This confirmation number can be used to help track the online enrollment, but it is not proof of membership. Please wait at least 10 days before calling the plan to ask about the status of your enrollment. Please keep this information in case you have any questions about your enrollment and need to contact your selected plan.

If any of the required information on your enrollment form was missing or does not match your Medicare record, the plan may contact you to get the missing or correct information. This could delay the plan's ability to process your enrollment.

Here are some important things to expect when your coverage is first effective if the plan determines that your enrollment meets all of the Medicare requirements and is complete. This information is especially important if you enrolled late in the month and you have not received a letter, or your membership card, by the day your coverage starts.

- After the plan has processed your application, you should get a letter from the plan you joined. This may take several
  days. If you do not receive correspondence from the plan in about 10 calendar days, you should contact the plan to
  check on the status of the enrollment.
- Enrollment can be effective as early as the first of the next month depending on your circumstances. The plan you
  have selected will inform you of your effective date of enrollment.
- If you need to fill a prescription before you get your plan membership card, let your pharmacist know your plan name and show any of the following materials as proof of membership:
  - Take your acknowledgement, welcome, or confirmation letter that you receive from the plan with you to the pharmacy.

### Please note: The confirmation number listed on this website cannot be used at your local pharmacy as proof of plan membership.

- If you haven't gotten a letter yet, you might have a copy of an enrollment application signed by a plan representative.
- of you have both Medicare and Medicaid, you should bring proof of enrollment in both programs such as your Medicare and Medicaid cards, a copy of a Medicare Summary Notice, a recent Medicaid bill, or a copy of your current Medicaid award letter. If you qualify for extra help (the low-income subsidy) you can also bring proof that you qualify such as a copy of your yellow or green automatic enrollment letter from Medicare (if you automatically qualify) or your approval letter from Social Security (if you applied and qualify).
- As a last resort, if you pay out of pocket for your prescription, save your receipts and work with your plan to be reimbursed.
- $\bullet\,$  If you have questions, call the plan's toll-free number.

### **Beneficiary Confirmation**

23. Ask the beneficiary to copy the confirmation number for your records.

The beneficiary can also view and download a copy of the application.

# Medicare Supplement Plans

View Section

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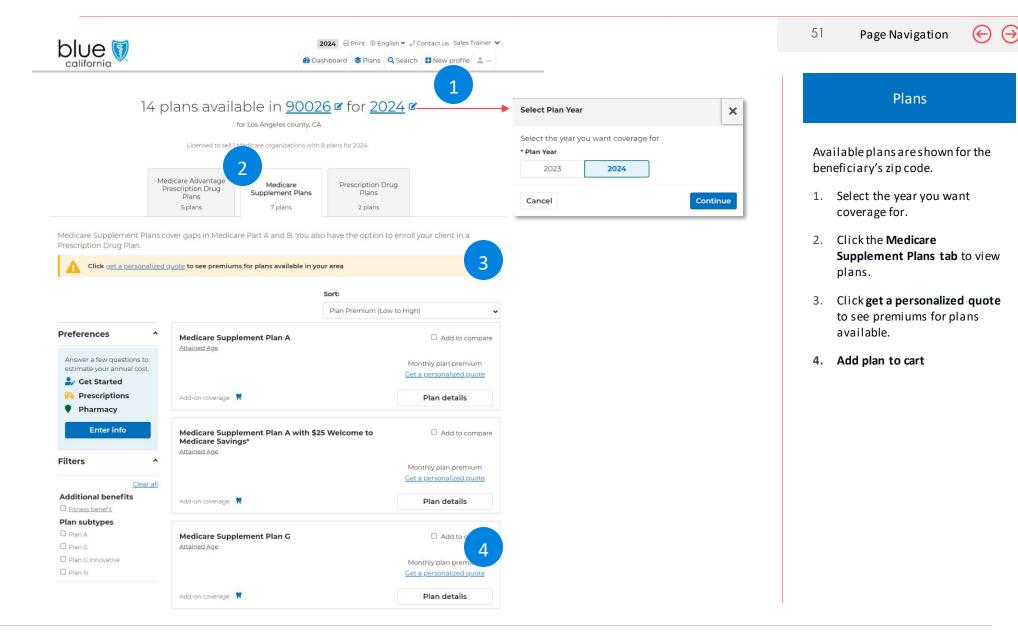
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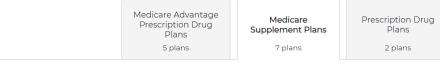
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## Quick Quote

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### Medicare Supplement Information

The information you provide below will be used to calculate your Medicare Supplement plan premium. Rates are determined based on your age at the time of your plan effective date.

To qualify for the \$25 monthly savings for the first 12 months of enrollment, you must be 65 years or older and Blue Shield must receive your application no later than six months from your original Medicare Part B effective date.



Continue to plans

## Medicare Supplement Information

The information you provide below is used to calculate the beneficiaries Medicare Supplement plan premium.

Rates are determined based on beneficiaries age at the time of their plan effective date.

5. Complete the form and click Continue to plans.

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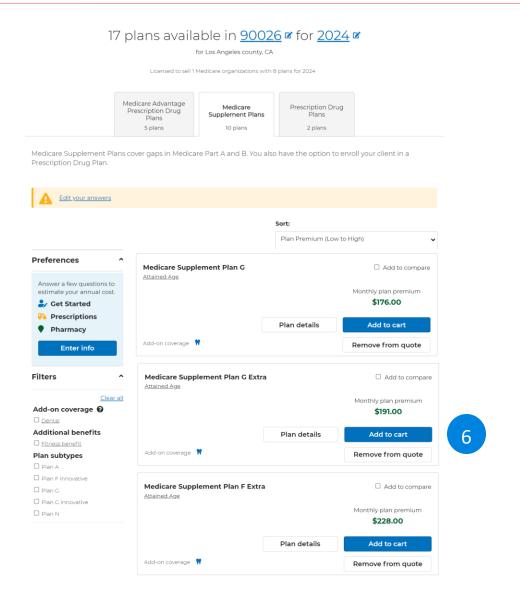
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## **Quick Quote**



### Plans

Available plans are shown for the beneficiary's zip code with their monthly plan premium.

6. Click the Add to cart button.

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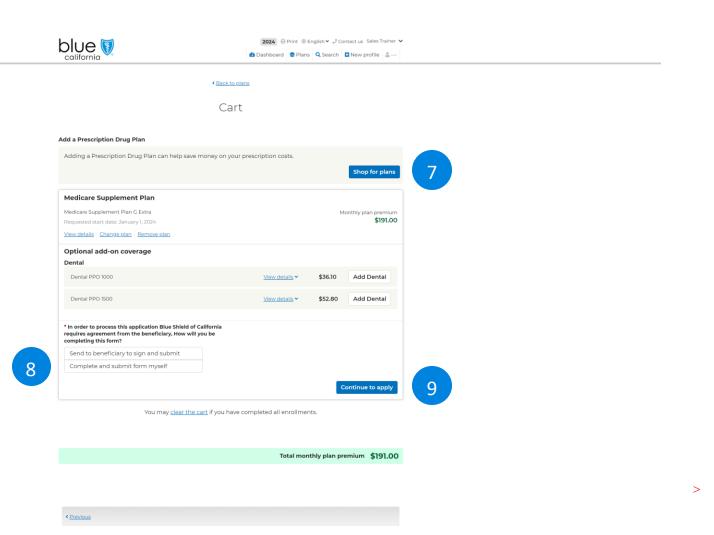
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### Add to Cart

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7. Add any optional add-on coverage.

You can only add optional coverage in the Cart screen.

- 8. Select how you will complete this form:
  - Send to beneficiary to sign and submit
  - Complete and submit form yourself
- 9. Click the **Continue to apply** button.

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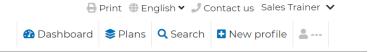
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Each of these links contain important information about Medicare Supplement and this plan.

## Medicare Supplement Plan G Extra

Choosing a Medigap Policy

**Evidence of Coverage** 

Multi-Lanugage Notice

Notice of New or Innovative Benefits Form

Summary of Benefits

Please be advised that if the information you provide on the enrollment form differs from the information you provided for a rate quote, then your premium may change.

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□\*I acknowledge I have read the above documents and fully understand their contents.

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Continue

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### Important Information

- 10. Check the checkbox to acknowledge that you have read the above documents and fully understand their conents.
- 11. Click the **Continue** button.

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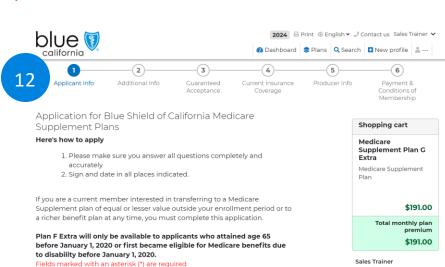
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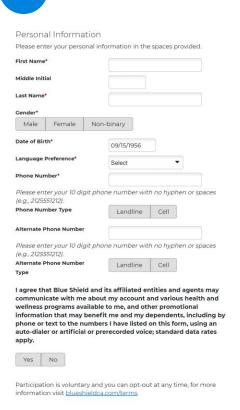


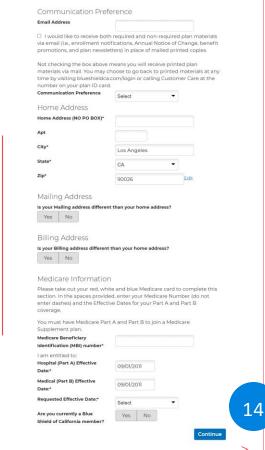
## **Shopping Cart**

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### Applicant Information

There is a 6-step process to completing the enrollment.

#### Step 1- Applicant Info

- 12. Complete the Personal Information sections:
  - Home Address
  - Mailing Address
  - Billing Address
  - Communication Preferences
- 13. Continue down the page to complete the Contact Information sections:
  - Medicare Information
  - Medicare Prescription Drug Plan Information
- 14. Click Next to continue.

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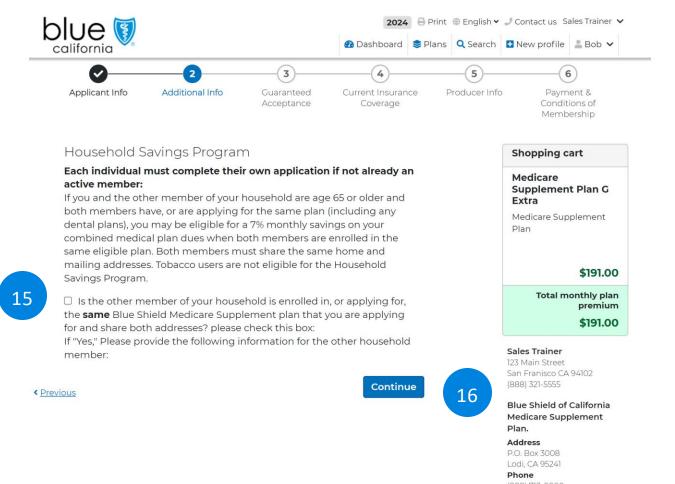
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### **Additional Information**

### Step 2- Additional Info

- 15. Check the box to acknowledge to indicate any other members of the beneficiary's household is enrolled in or applying for the same Blue Shield Medicare Supplement plan.
- 16. Click the **Continue** button.

>

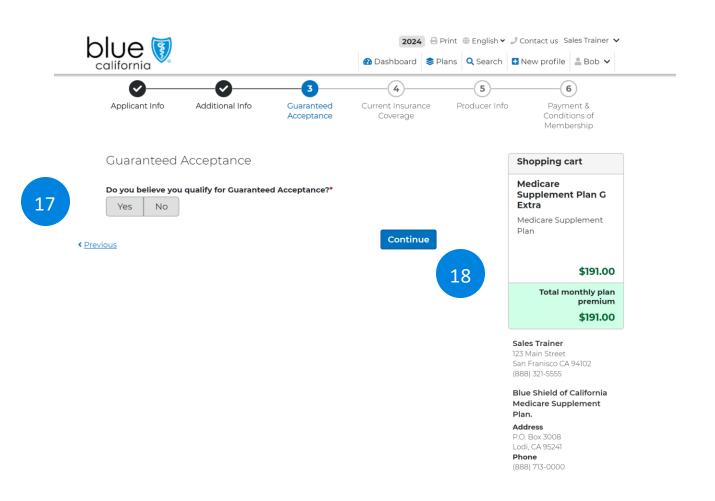
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### **Guaranteed Acceptance**

#### Step 3- Guaranteed Acceptance

17. Indicate if the beneficiary qualifies for Guaranteed Acceptance.

Depending on how you answer the question, additional fields will appear, and you must complete the form to move the next part of the application.

18. Click the **Continue** button.

>

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## **Shopping Cart**

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### Current Insurance Coverage Information (Required For All Submissions)

If you lost or are losing other health insurance coverage and received a notice from your prior insurer saying you were eligible for guaranteed issue of a Medicare Supplement insurance contract, or that you had certain rights to buy such a contract, you may be eligible for guaranteed acceptance in one or more of our Medicare Supplements plans. The Blue Shield Guaranteed Acceptance Guide describes the different situations in which you may be eligible for guaranteed issue of a Medicare Supplement plan. It is important to note that the time period of eligibility for guaranteed issuance may vary by situation, and you must apply within this time period to be eligible for guaranteed acceptance.

Please fax or mail a copy of the front and back of your current carrier ID card. And please also include a copy of the notice from you prior insurer. Please fax the documents to (844) 266-1850 or mail to: Blue Shield of California. P.O Box 3008. Lodi. Ca 95241-1912.

Please answer all questions to the best of your knowledge. (Please check Yes or No below.)



123 Main Street San Franisco CA 94102 (888) 321-5555

Blue Shield of California Medicare Supplement



2.

a. Are you covered for medical assistance through California's Medi-Cal program?

NOTE TO APPLICANT: if you have a share cost under the Medi-Cal program,

NOTE TO APPLICANT: if you have a share cost under the Medi-Cal program, please answer No to this question.\*

Yes No

3.

a. Have you had coverage from any Medicare plan other than Original Medicare within the past 63 days (for example, a Medicare Advantage plan or a Medicare HMO or PPO)?If yes fill in your start and end dates below. If you are still covered under this plan, leave the "End "blank."

Yes No

4a. Do you have any another Medicare Supplement plan policy or certificate or contract in force?\*

Yes No

5. Have you had coverage under any other health insurance within the past 63 days (for example, an employer, union, or individual plan)?\*

Yes No

6. Are you under age 65?\*

Yes No

You may contact the California Health Insurance Counseling and Advocacy Program (HICAP) for guidance. HICAP provides health insurance counseling for California senior citizens. Call HICAP toll-free at (800) 434-0222 for a referral to your local HICAP office. HICAP is a service provided free of charge by the state of California. A rate guide is available that compares the policies sold by different insurers. You can obtain a copy of this rate guide by calling the Department of Managed Health Care's consumer toll-free telephone number (1-888-466-2219), by calling the Health Insurance Counseling and Advocacy Program (HICAP) toll-free telephone number (1-800-434-0222), or by accessing the Department of Managed Health Care's Internet website (www.dmhc.ca.gov).

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Continue

### Current Insurance Coverage

### Step 4- Current Insurance Coverage

- 19. Complete the Current Insurance Coverage section.
- 20. Click Continue to go to Step 5.

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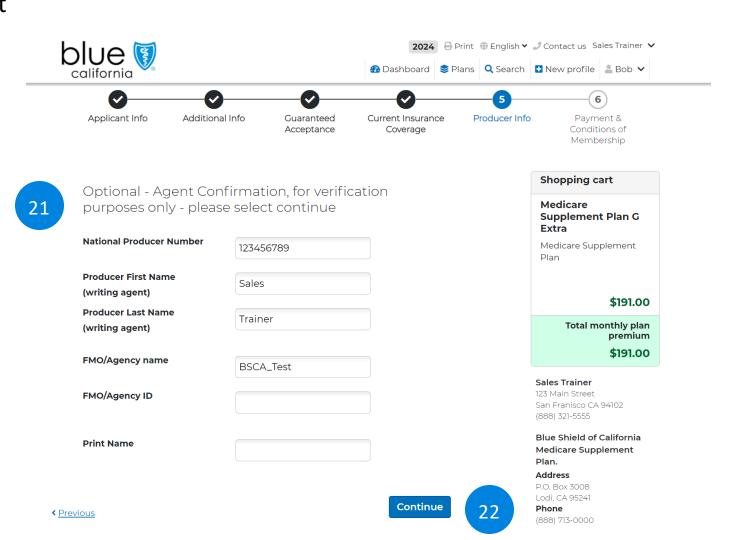
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### **Producer Information**

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#### Step 5- Producer Information

- 21. Complete the Agent information section.
- 22. Click the **Continue** button.

>

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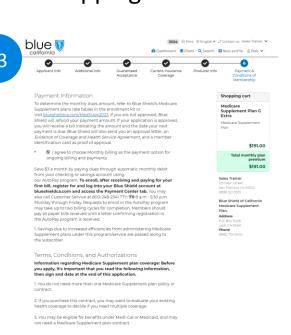
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(←)

**Shopping Cart** 

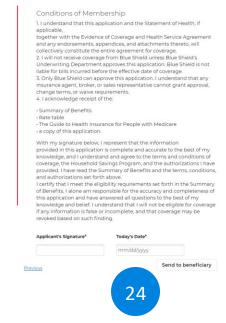


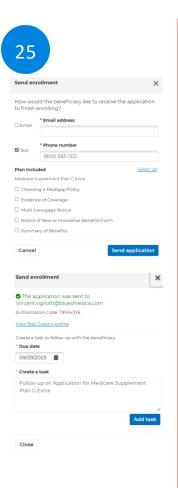
4. If after purchasing this contract you become eligible for Medi-Cal, the benefits and premiums under your Medicare Supplement plan contract can be suspended, if requested, during your entitlement to benefits under Medi-Cal or Medicaid for 24 months. You must request this suspension within 90 days of becoming eligible for Medi-Cal or Medicaid. If you are no longer entitled to Medi-Cal or Medicaid, your suspended Medicare Supplement plan contract (or if that is no longer available, a substantially equivalent contract) will be reinstituted if requested within 90 days of losing Medi-Cal or Medicaid eligibility. If the Medicare Supplement plan contract provided coverage for outpatient prescription drugs, and you enrolled in Medicare Part D while your contract was suspended, the reinstituted contract will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.

5. If you are eligible for, and have enrolled in, a Medicare Supplement plan contract by reason of disability, and you later become covered by an employer or union-based group health plan, the benefits and premiums under your Medicare Supplement plan contract can be suspended, if requested, while you are covered under the employer or union-based group health plan. If you suspend your Medicare Supplement plan contract under these circumstances and later lose your employer or union-based group health plan, your suspended Medicare Supplement plan contract (or if that is no longer available, a substantially equivalent contract) will be reinstituted if requested within 90 days of losing your employer or union-based group health plan. If the Medicare Supplement plan contract provided coverage for outpatient prescription drugs, and you enrolled in Medicare Part D while your contract was suspended, the reinstituted contract will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.

6. Counseling services are available in California to provide advice concerning your purchase of Medicare Supplement plan coverage and concerning medical assistance through the Medi-Cal program, including your benefits as a qualified Medicare beneficiary (QMB) and a specified low-income Medicare beneficiary (SLMB). You may obtain information regarding counseling services from the State Department of Aging.

7. Receiving materials and communications electronically versus print: You may receive required benefit plan and coverage-related materials and communications via email and/or the Bli\(\frac{1}{2}\) bopping Carijvebsite blueshieldca.com. as applicable. Obtaining a document electronically will confirm your consent to electronic delivery. You also have the right to obtain printed, mailed materials at any time and at no expense to you. To receive printed materials in the mail, to opt out of email communications, please call 800-248-2341 TTY: 711 8 a.m. – 8 P.m. seven days a week, year-round.





## Payment & Conditions of Membership

Page Navigation

Complete the application.

## Step 6 - Payment & Conditions of Membership

- 23. Complete the Payment & Conditions of Membership Section.
- 24. Click **send to beneficiary** to send that application to the beneficiary for signing.
- 25. Complete the form and select the method of sending the application to the beneficiary by selecting a check box (you can select multiple boxes). Click **Send Application**.

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## **Shopping Cart**



4. If after purchasing this contract you become eligible for Medi-Cal, the benefits and premiums under your Medicare Supplement plan contract can be suspended, if requested, during your entitlement to benefits under Medi-Cal or Medicaid for 24 months. You must request this suspension within 90 days of becoming eligible for Medi-Cal or Medicaid. If you are no longer entitled to Medi-Cal or Medicaid, your suspended Medicare Supplement plan contract (or if that is no longer available, a substantially equivalent contract) will be reinstituted if requested within 90 days of losing Medi-Cal or Medicaid eligibility. If the Medicare Supplement plan contract provided coverage for outpatient prescription drugs, and you enrolled in Medicare Part D while your contract was suspended, the reinstituted contract will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.

5. If you are eligible for, and have enrolled in, a Medicare Supplement plan contract by reason of disability, and you later become covered by an employer or union-based group health plan, the benefits and premiums under your Medicare Supplement plan contract can be suspended, if requested, while you are covered under the employer or union-based group health plan. If you suspend your Medicare Supplement plan contract under these circumstances and later lose your employer or union-based group health plan, your suspended Medicare Supplement plan contract (or if that is no longer available, a substantially equivalent contract) will be reinstituted if requested within 90 days of losing your employer or union-based group health plan. If the Medicare Supplement plan contract provided coverage for outpatient prescription drugs, and you enrolled in Medicare Part D while your contract was suspended, the reinstituted contract will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.

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7. Receiving materials and communications electronically versus print: You may receive required benefit plan and coverage-related materials and communications via email and/or the Blushopping Cart/vebsite blueshieldca.com, as applicable. Obtaining a document electronically will confirm your consent to electronic delivery. You also have the right to obtain printed, mailed materials at any time and at no expense to you. To receive printed materials in the mail, to opt out of email communications, please call 800-248-2341 TTY: 711 8 a.m. – 8 P.m. seven days a week, year-round.

#### Conditions of Membership

1. I understand that this application and the Statement of Health, if

together with the Evidence of Coverage and Health Service Agreement and any endorsements, appendices, and attachments thereto, will collectively constitute the entire agreement for coverage.

- I will not receive coverage from Blue Shield unless Blue Shield's Underwriting Department approves this application. Blue Shield is not liable for bills incurred before the effective date of coverage.
- Only Blue Shield can approve this application. I understand that any insurance agent, broker, or sales representative cannot grant approval, change terms, or waive requirements.
- 4. I acknowledge receipt of the:
- Summary of Benefits
- · Rate table
- · The Guide to Health Insurance for People with Medicare
- a copy of this application

With my signature below, I represent that the information provided in this application is complete and accurate to the best of my knowledge, and I understand and agree to the terms and conditions of coverage, the Household Savings Program, and the authorizations I have provided. I have read the Summary of Benefits and the terms, conditions, and authorizations set forth above.

I certify that I meet the eligibility requirements set forth in the Summary of Benefits. I alone am responsible for the accuracy and completeness of this application and have answered all questions to the best of my knowledge and belief. I understand that I will not be eligible for coverage if any information is false or incomplete, and that coverage may be revoked based on such finding.

Applicant's Signature\*

Today's Date\*

mm/\(dd/\)yyy

Submit

## Payment & Conditions of Membership

Complete the application.

Step 6 - Payment & Conditions of Membership

- 26. Complete the Payment & Conditions of Membership Section.
- 27. Beneficiary signs the application.
- 28. Beneficiary submits the Application.

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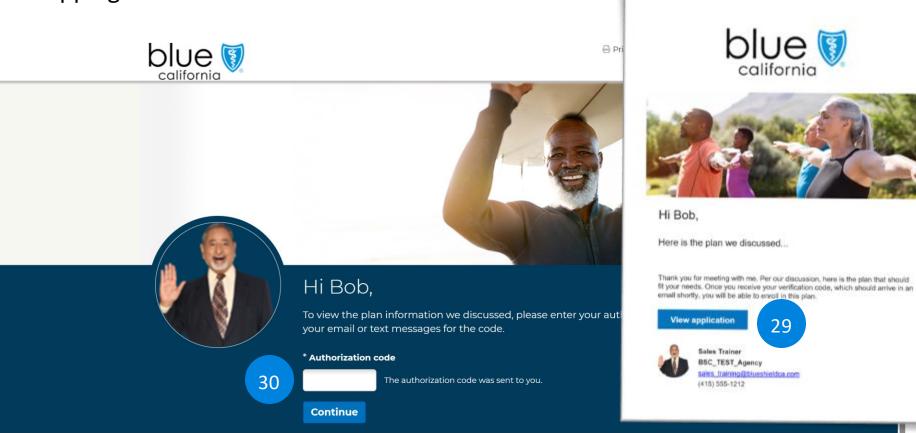
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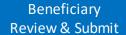
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## **Shopping Cart**

Quick Reference Guide





29. The beneficiary will receive an email or text with a link.

When they click the link, they are taken to application to sign and submit.

30. The beneficiary will also receive a second email with the authorization code to access the application.



Meet with Sales Trainer

(888) 321-5555 S\_trainer@email.com

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Enroll a New Beneficiary

Search Profiles & Enrollments

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## **Shopping Cart**

Note: You must complete all fields that are marked with an asterisk (\*). Some

items are optional. You cannot be denied coverage because you don't fill

. If you want to join a plan during fall open enrollment (October 15-

on the Review & Submit page of this application.

December 7), the plan must get your completed form by December 7

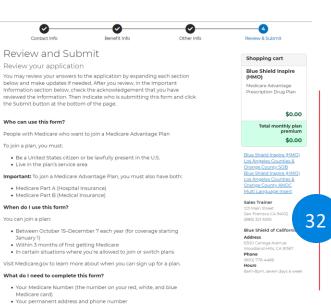
. Your plan will send you a bill for the plan's premium. You can choose to

account or your monthly Social Security (or Railroad Retirement Board)

benefit. For more information, see Paying Your Plan Premium section

sign up to have your premium payments deducted from your bank

them out.



\*What is your relationship to the person enrolling in this p 31 I am (or am helping) the person enrolling I am an agent or authorized person Beneficiary Signature ☐ Due to physical limitations, I am unable to sign \*Please sign your name in the space below using your Bob B

☐ **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,
- 2. Documentation of this authority is available upon request by Medicare.

#### Paying Your Plan Premium

You can pay your monthly plan premium (including any late enrollment penalty you currently have or may owe) by mail each month. If your plan has a premium due, you will receive a monthly bill including the amount and the date of when your next payment is due, or you may choose to pay your premium by having it automatically taken out of your Social Security or Railroad Retirement Board (RRB) benefit each month.

To learn more about your payment options, visit us at blueshieldca.com/medicarewaystopay or call Customer Care at 800-776-4466 (TTY: 711). For members enrolled in D-SNP plans, please contact D-SNP Customer Care 800-452-4413 (TTY: 711). For Medicare Prescription drug plans 888-239-6469

Electronic funds transfer (EFT) from your bank account each month Credit Card Get Monthly Bill Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check.

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 Blue Shield of California the Part D-IRMAA

#### PRIVACY ACT STATEMENT

The Centers for Medicare & Medicaid Services (CMS) collects information from Medicare plans to track beneficiary enrollment in Medicare Advantage (MA) and Medicare 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 and 422.60 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.

< Previous

>

### Beneficiary **Review & Submit**

#### Step 4 - Review & Submit

- 31. For the question: "What is your relationship to the person enrolling in this plan?"
  - Select "I am (or am helping) the person enrolling" if you have the Power of Attorney (POA) or the beneficiary.
  - Select "I am an agent or authorized person" if you are the Broker/Agent.
- 32. The beneficiary signs the form.
- 33. Click Submit.

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Start a New Consultation

What's Next:

Send Quick Quote Enroll a New Beneficiary Search Profiles & Enrollments

Continue applying for coverage

Drug and Pharmacy Finder

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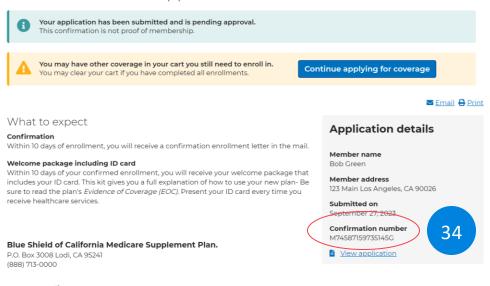
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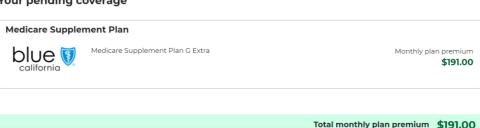


## **Shopping Cart**





#### Your pending coverage



This confirmation number can be used to help track the online enrollment, but it is not proof of membership. Please wait at least 10 days before calling the plan to ask about the status of your enrollment. Please keep this information in case you have any questions about your enrollment and need to contact your selected plan.

If any of the required information on your enrollment form was missing or does not match your Medicare record, the plan may contact you to get the missing or correct information. This could delay the plan's ability to process your enrollment.

Here are some important things to expect when your coverage is first effective if the plan determines that your enrollment meets all of the Medicare requirements and is complete. This information is especially important if you enrolled late in the month and you have not received a letter, or your membership card, by the day your coverage starts.

- After the plan has processed your application, you should get a letter from the plan you joined. This may take several
  days. If you do not receive correspondence from the plan in about 10 calendar days, you should contact the plan to
  check on the status of the enrollment.
- Enrollment can be effective as early as the first of the next month depending on your circumstances. The plan you
  have selected will inform you of your effective date of enrollment.
- If you need to fill a prescription before you get your plan membership card, let your pharmacist know your plan name and show any of the following materials as proof of membership:
  - Take your acknowledgement, welcome, or confirmation letter that you receive from the plan with you to the pharmacy.

Please note: The confirmation number listed on this website cannot be used at your local pharmacy as proof of plan membership.

- If you haven't gotten a letter yet, you might have a copy of an enrollment application signed by a plan
  representative
- If you have both Medicare and Medicaid, you should bring proof of enrollment in both programs such as your
  Medicare and Medicaid cards, a copy of a Medicare Summary Notice, a recent Medicaid bill, or a copy of your
  current Medicaid award letter. If you qualify for extra help (the low-income subsidy) you can also bring proof
  that you qualify such as a copy of your yellow or green automatic enrollment letter from Medicare (if you
  automatically qualify) or your approval letter from Social Security (if you applied and qualify).
- As a last resort, if you pay out of pocket for your prescription, save your receipts and work with your plan to be reimbursed.
- If you have questions, call the plan's toll-free number.

### **Beneficiary Confirmation**

34. Ask the beneficiary to copy the confirmation number for your records.

The beneficiary can also view and download a copy of the application.

BLUE SHIELD OF CALIFORNIA

# Health Risk Assessment

View Section

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### Health Risk Assessment Process Overview

The Health Risk Assessment is available for our Exclusively Aligned Enrollment (EAE) Blue Shield TotalDual Plan (HMO D-SNP) for Los Angeles and San Diego Counties and Non-Exclusively Aligned Enrollment (EAE) Blue Shield Inspire (HMO D-SNP) for San Joaquin/Stanislaus/Merced Counties.

- Enrollment application form must have an app submission date prior to the effective date of the member in the DSNP plan.
- HRA form must have an HRA submission date that is equal to the enrollment app submission date.
- For February through December enrollments, the app submission date must be before the member effective date for the Plan.
- Scenario: May 2024 enrollments must have an app submission date before May 1, 2024. Definition: "Enrollments" mean the member effective date/month with the DSNP Plan.

### Other Criteria

- Enrollment must be submitted through DRX and/or DocuSign only (paper apps are excluded).
- Eligible for DSNP plans only. Other MAPD and MAPPO plans are excluded.
- Eligible for Individual brokers only. FMOs, Private Exchange and BSC Internal Reps are excluded.

### **Timing**

- Incentives will be paid on the month following the member effective date.
- Ex. Incentive payout for January 2024 member effectives will occur in February 2024.

### Look-back

There will be a 90-day look-back to check for member late installs and ownership updates only.

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## Business Rules Scenarios for the HRA Incentive Eligibility

	Submission Date	Effective Date	Plan Type	Broker	Pay HRA Incentive?	Comments
Scenario 1	11/4/23	1/1/24	MAPD	Broker A		
	12/6/23	1/1/24	DSNP	Broker A	Υ	
Scenario 2	11/4/23	1/1/24	DSNP	Broker A		
	12/6/23	1/1/24	MAPD	Broker A	N	No HRA payment
Scenario 3	11/4/23	1/1/24	DSNP	Broker A	Υ	This broker will be paid both the HRA incentive and the commission
	12/6/23	1/1/24	DSNP	Broker A	N	No duplicate payment due to the same plan type
Scenario 4	11/4/23	1/1/24	DSNP	Broker A	Υ	This broker will be paid both the HRA incentive and the commission
	12/6/23	1/1/24	DSNP	Broker B	N	No duplicate payment due to the same plan type
Scenario 5	12/7/23	1/1/24	DSNP	Broker A		Not likely to happen but if it does happen,
	3/1/24	1/1/24	DSNP	Broker B		needs to be flagged and reviewed by SalesOps if payment to incorrect broker needs to be recouped

### Overview

Here are scenarios that you may come across.

- Scenario 1 The beneficiary moved from a MAPD to the DSNP plan.
- **2.** Scenario 2 The beneficiary moves from a DSNP to a MAPD plan.
- Scenario 3 The beneficiary is currently enrolled in a DSNP plan and re-enrolls in the DSNP plan for a 1/1/2024 effective date.
- 4. Scenario 4 The beneficiary is enrolled in the DSNP plan effective 1/1/2024 and submits an enrollment with another broker for the same plan and effective date (aka duplicate enrollment).
- 5. Scenario 5 the beneficiary is enrolled in the DSNP plan effective 1/1/2024 and dis-enrolls. Submits an enrollment with another broker for the same plan and an effective date with 6 months of the prior date.

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## Next Steps – Completing the Health Risk Assessment







#### Confirmation

Within 10 days of enrollment, you will receive a confirmation enrollment letter in the mail. It is also confirmation that Medicare has approved your enrollment

#### Member ID card

You will also receive your member ID card. Keep this with you for all your doctor, hospital, and pharmacy visits.

#### Welcome package

You will receive a package containing important plan documents. This includes instructions about how to access the Evidence of Coverage, drug list, and provider directory.

#### Premium assistance

If you qualify for help, you will receive a Low-Income Subsidy (LIS) letter. Depending on your level of coverage, receiving US means lower prescription drug costs and financial assistance to cover your Part D premium.

#### Complete your Health Risk Assessment HMO, D-SNP members only

If you have enrolled in a D-SNP plan, Blue Shield Care Coordinators will call you within 90 days of enrolling to complete your Health Risk Assessment (HRA) and Care Plan. Completing these tools helps our Care Coordinators individualize your care to meet your needs. You can also complete your HRA by mail or call 1-888-548-5765.

#### Next steps

Please complete the plan's optional Health Risk Assessment to gather more information about your health so they may provide health improvement suggestions.

1

Complete Health Risk Assessment

### Application details

Email Print

#### **Member name** Bob Green

......

#### Member address

123 Main Los Angeles, CA 90026

#### Submitted on September 27, 2023

Confirmation number

#### A54817984979463M

View application

### At the time of Enrollment

When the application is submitted, the broker/agent has the option to complete the Health Risk Assessment.

1. Click the button to open the form.

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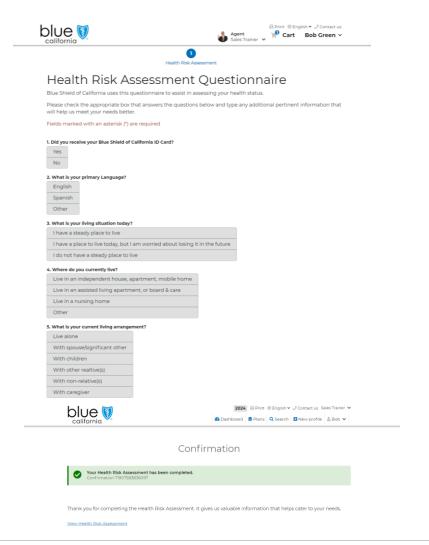
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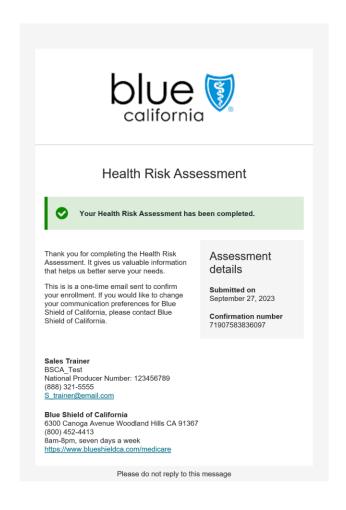
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### HRA Form

Quick Reference Guide





### Complete the HRA form

The broker must complete the form in its entirety (all required fields) before submitting.

- Incomplete forms will not qualify for incentive payouts.
- HRA must be completed at the time of enrollment to qualify for incentive payouts.
- 2. Complete the form.

The beneficiary will receive an email acknowledging the completion of the form.



First name

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Search

Quick Reference Guide

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Date of birth

Phone number

### Search beneficiaries

Last name

Email address	Confirmation number	Medicare Number	

### Search

Page Navigation

Select **Search** to find and access an existing beneficiary profile. Upon logging in, you will be automatically directed to the "Search Beneficiary " page to avoid creating a duplicate profile.

- 1. Enter the beneficiary's information using any of the search criteria available.
- 2. Click the **Search Profiles** button.

**NOTE:** The "Personal Code" field has been removed.

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## Search Results

Quick Reference Guide

### Search beneficiaries

A registrant is a new beneficiary who has not started the process for an enrollment application. An applicant has started their enrollment application. Completing a Scope of Appointment does not impact a beneficiary's status.

### Search results

Download results

Last name

✓

Gavin D

121 N Elm Dr Beverly
Hills , CA 90210

Registrant

Updated 09/19/2023

or search again

### **Profile Search Results**

The results show all available beneficiaries that match the search results.

Each result shows the beneficiaries' sales stage and the date the record was updated.

3. Click the **hyperlinked name** to view the profile.

Login

Start a New Consultation

Send Quick Quote Enroll a New Beneficiary Search Profiles & Enrollments

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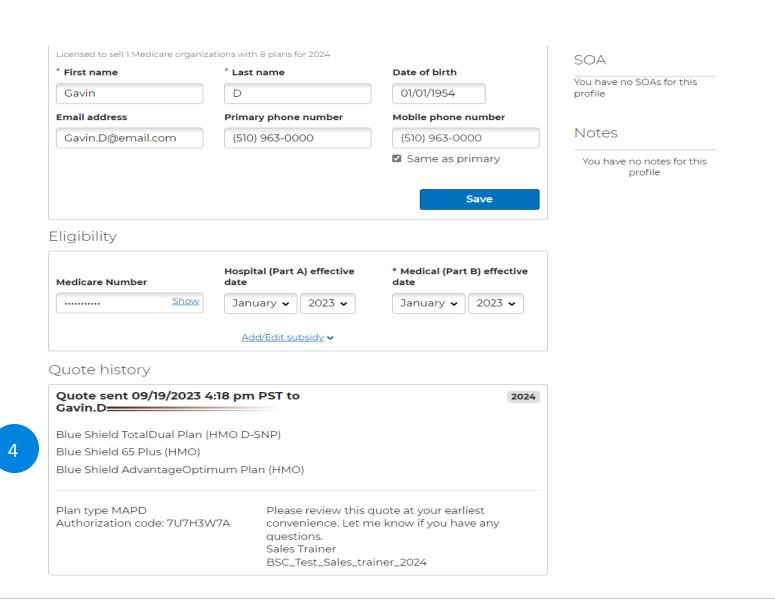
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### View Profile

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### Profile

The beneficiaries quotes and enrollment history is shown at the bottom of the page.

4. Click on the quote or application to view.

Login

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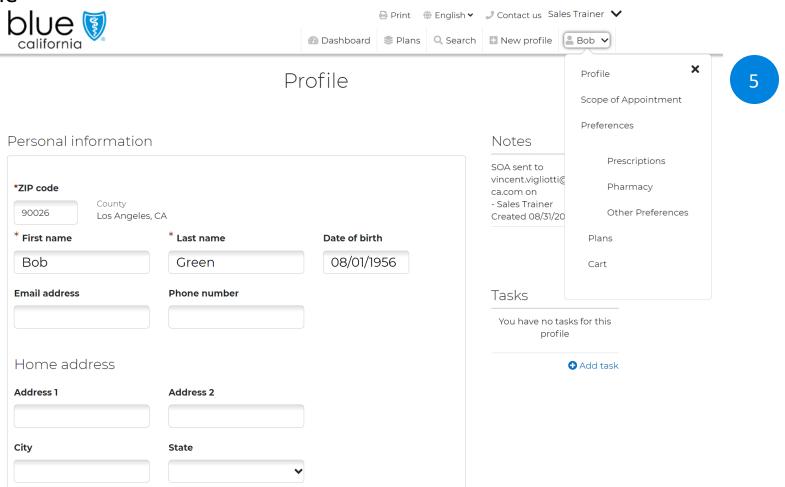
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## View Profile

Quick Reference Guide



### Profile

 When you are working with a beneficiary profile, you can easily see the beneficiary's name and use the dropdown navigation bar to access different steps in the workflow.



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**Drug and Pharmacy Finder** 





Terms of use

### Dashboard

Home Privacy policy
Drug and pharmacy finder Accessibility statement

### Search

Page Navigation

At the bottom of each page's footer, there is a link to the drug and pharmacy finder.

1. Click the link to view the drug and pharmacy finder.

Login

Start a New Consultation Send Quick Quote

Enroll a New Beneficiary

Search Profiles & Enrollments

Drug and Pharmacy Finder

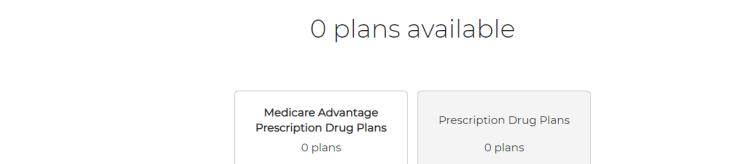
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## Drug and Pharmacy Finder



Please enter your ZIP code to see plans.

\*ZIP code

View plans

### Search

2. Enter a zip code.

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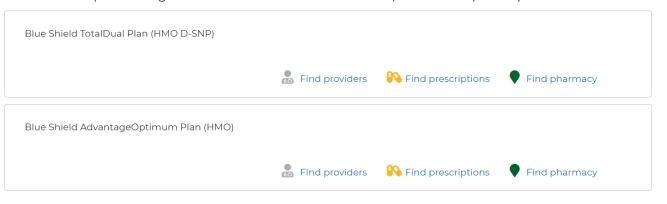
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## Drug and Pharmacy Finder



Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions.



### Search Results

- 3. Click on:
  - Find Prescriptions
  - Find Pharmacy

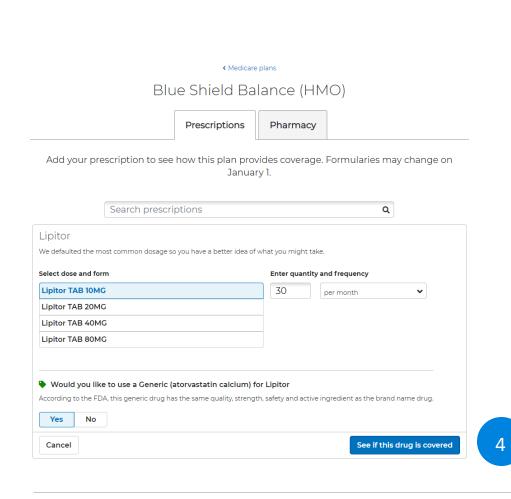
To see if the drug or pharmacy is covered by the plan.

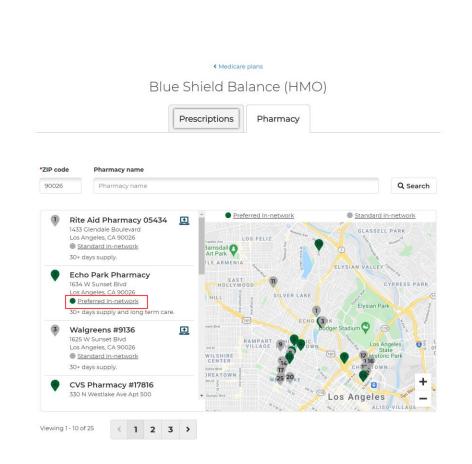
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## Drug and Pharmacy Finder





### **Enter Information**

### 4. For Prescriptions:

- · Enter the information.
- Click the button to see if drug is covered by the plan.

#### For Pharmacy:

- Enter the Pharmacy name.
- Check to see if it is a Preferred in-network pharmacy.

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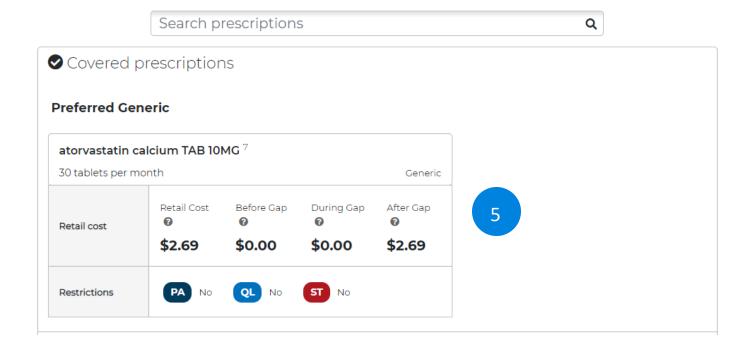
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## Drug and Pharmacy Finder

Add your prescription to see how this plan provides coverage. Formularies may change on January 1.



### Results

5. Review the results

🥒 Contact us | Sales Trainer 💙

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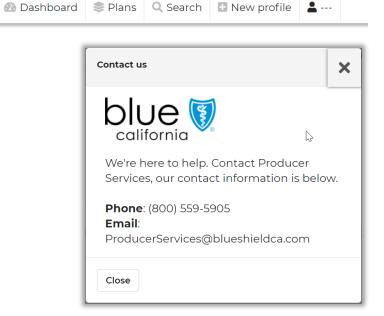
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### Resources

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- Broker Connection Site: <a href="https://www.blueshieldca.com/producer">https://www.blueshieldca.com/producer</a>
- Consumer Application Status Site: <a href="https://www.blueshieldca.com/brokerwebapp/medicareProspectAppStatus">https://www.blueshieldca.com/brokerwebapp/medicareProspectAppStatus</a>





### **Contact Us**

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Blue Shield Producer Services
Phone Number:

1-800-559-5905