



2023 Individual Enrollment Request Form

Blue Shield Medicare Advantage Plans: Blue Shield 65 Plus (HMO), Blue Shield 65 Plus Plan 2 (HMO), Blue Shield 65 Plus Choice Plan (HMO), Blue Shield Inspire (HMO), Blue Shield Balance (HMO), Blue Shield Enhanced (HMO), Blue Shield AdvantageOptimum Plan (HMO), Blue Shield AdvantageOptimum Plan 1 (HMO), Blue Shield TotalDual Plan (HMO D-SNP), Blue Shield Inspire (HMO D-SNP)

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

What do I need to complete this form?

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

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

Reminders:

- If you want to join a plan during fall open enrollment (October 15–December 7), the plan must get your completed form by December 7.

- Your plan will send you a bill for the plan's premium. You can choose to sign up to have your premium payments deducted from your bank account or your monthly Social Security (or Railroad Retirement Board) benefit.

What happens next?

Email, Mail, or Fax your completed and signed form to:

Email: WHMembership@blueshieldca.com

Mail: Blue Shield of California
PO Box 948
Woodland Hills, CA 91365-9856

Fax: (877) 251-3660

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

How do I get help with this form?

Call your Authorized Agent or your Blue Shield Representative at **(888) 534-4263**. TTY users can call **711**. Or, call Medicare at 1-800-MEDICARE (1-800-633-4227). TTY users can call 1-877-486-2048.

En español: Llame a su Agente Autorizado o a su Representante de Blue Shield al **(888) 534-4263**. Los usuarios del sistema TTY pueden llamar al **711** o a Medicare gratis al 1-800-633-4227 y oprima el 2 para asistencia en español y un representante estará disponible para asistirle.

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.

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-1378. The time required to complete this information is estimated to average 20 minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

IMPORTANT

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

Section 1 – All fields in this section are required (unless marked optional)

Select the plan you want to join:

- Blue Shield 65 Plus (HMO) Los Angeles/Orange Counties (\$0 per month)
 - Blue Shield 65 Plus (HMO) Kern County (\$0 per month)
 - Blue Shield 65 Plus (HMO) Riverside County (\$0 per month)
 - Blue Shield 65 Plus (HMO) San Bernardino County (\$0 per month)
 - Blue Shield 65 Plus (HMO) San Diego County (\$0 per month)
 - Blue Shield 65 Plus (HMO) San Luis Obispo/Santa Barbara Counties (\$39 per month)
 - Blue Shield 65 Plus (HMO) Ventura County (\$0 per month)
 - Blue Shield 65 Plus Plan 2 (HMO) Los Angeles/Orange Counties (\$0 per month)
 - Blue Shield 65 Plus Choice Plan (HMO) San Bernardino/Riverside Counties (\$0 per month)
 - Blue Shield Enhanced (HMO) Los Angeles/Orange Counties (\$39 per month)
 - Blue Shield AdvantageOptimum Plan (HMO) Los Angeles/Orange Counties (\$0 per month)
 - Blue Shield AdvantageOptimum Plan 1 (HMO) San Diego County (\$0 per month)
 - Blue Shield Balance (HMO) Los Angeles County (\$0 per month)
 - Blue Shield Inspire (HMO) Alameda/San Mateo Counties (\$0 per month)
 - Blue Shield Inspire (HMO) Los Angeles/Orange Counties (\$0 per month)
 - Blue Shield Inspire (HMO) Sacramento County (\$53 per month)
 - Blue Shield Inspire (HMO) San Joaquin/Stanislaus/Merced/Fresno/Madera/Santa Clara Counties (\$0 per month)
 - Blue Shield Inspire (HMO D-SNP) Merced/San Joaquin/Stanislaus Counties (\$38.90 per month)
 - Blue Shield TotalDual Plan (HMO D-SNP) Los Angeles/San Diego Counties (\$0 per month)
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Blue Shield Inspire (HMO) in the counties of Alameda, Fresno, Madera, Merced, Sacramento, San Joaquin, San Mateo, Santa Clara, and Stanislaus; Blue Shield Inspire (HMO D-SNP) in San Joaquin, Merced and Stanislaus; and Blue Shield Balance (HMO) in the county of Los Angeles includes one or more Special Supplemental Benefits for the Chronically Ill (SSBCI). SSBCI are part of special supplemental benefits available in select plans. Not all plan members will qualify. Refer to the Evidence of Coverage for details and eligibility requirements. To be eligible for each SSBCI benefit, you must have at least one of the required qualifying chronic conditions which can vary by plan. Please refer to the "Attestation for Special Supplemental Benefit for the Chronically Ill (SSBCI)" form included in the enrollment kit, online or contact Customer Care **(800) 776-4466 (TTY: 711)** for a copy. For members enrolled in D-SNP plans, please contact D-SNP Customer Care **(800) 452-4413 (TTY: 711)**.

Please indicate if you would like to enroll in the Optional Supplemental Dental HMO or PPO plan

- Optional Supplemental Dental HMO plan**, (\$12.50 per month)
(not available in all plans/service areas; refer to the plan summary of benefits for additional information.)
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Name of Dentist:

Provider ID#:

If you do not select a dentist, you will be assigned a dentist at the time of enrollment.

- Optional Supplemental Dental PPO plan**, (\$42.30 per month)
(not available in all plans/service areas; refer to the plan summary of benefits for additional information.)

No dentist selection necessary for the PPO plan.

First Name:		(optional): Middle Initial:
Last Name:		Sex: <input type="checkbox"/> M <input type="checkbox"/> F
Birth Date (MM/DD/YYYY):	Phone Number:	(optional): <input type="checkbox"/> Landline <input type="checkbox"/> Cell
	Alternate Phone Number (optional):	(optional): <input type="checkbox"/> Landline <input type="checkbox"/> Cell

Optional: I agree that Blue Shield and its affiliated entities and agents may communicate with me about my account and various health and wellness programs available to me, and other promotional information that may benefit me and my dependents, including by phone or text to the numbers I have listed on this form, using an auto-dialer or artificial or prerecorded voice; standard data rates apply. Yes No

Participation is voluntary and you can opt-out at any time, for more information visit blueshieldca.com/terms.

Go paperless! Please watch for an email with a link which will allow you to register your account, customize your communication preferences, and access your digital ID card and benefit information.

Email address (Optional, but required for electronic communications)

I would like to receive both required and non-required plan materials via email (i.e., enrollment notifications, Annual Notice of Change, benefit promotions, and plan newsletters) in place of mailed printed copies.

Not checking the box above means you will receive printed plan materials via mail. You may choose to go back to printed materials at any time by calling Customer Care at the number on your plan ID card.

Preferred communication channel: Email SMS (Text) Standard Mail Call

It's our goal to communicate with you in your preferred method. However, in some situations, we may need to adjust how we are providing you with information.

Permanent Residence street address:

Street Address:

City: State: ZIP code:

Mailing address, if different from your permanent address (P.O. Box allowed):

Street Address:

City: State: ZIP code:

Your Medicare information:

Medicare Number:

Answer these important questions:

Will you have other prescription drug coverage (like VA, TRICARE) in addition to a Blue Shield Medicare Advantage Plan?

Yes No

Prescription drug coverage:

Name of other coverage:

ID # for this coverage:

Group #:

Medical coverage:

Name of other coverage:

ID # for this coverage:

Group #:

Are you enrolled in your State Medicaid (Medi-Cal) program? Yes No
If yes, please provide your Medicaid (Medi-Cal) number

IMPORTANT: Read and sign below:

- I must keep both Hospital (Part A) and Medical (Part B) to stay in a Blue Shield Medicare Advantage Plan.
- By joining this Medicare Advantage Plan, I acknowledge that my Blue Shield Medicare Advantage Plan 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).
- I understand that when my Blue Shield Medicare Advantage Plan coverage begins, I must get all of my medical and prescription drug benefits from that Blue Shield Medicare Advantage Plan. Benefits and services provided by my Blue Shield Medicare Advantage Plan and contained in my Blue Shield Medicare Advantage Plan *Evidence of Coverage* document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor my Blue Shield Medicare Advantage Plan will pay for benefits or services that are not covered.
- 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 my signature (or the signature of the person legally authorized to act on my behalf) on this application means that I have read and understand the contents of this application. If signed by an authorized representative (as described above), this signature certifies that:
 - 1) This person is authorized under State law to complete this enrollment, and
 - 2) Documentation of this authority is available upon request by Medicare.

Signature	Today's Date
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If you're the authorized representative, sign above and fill out these fields.

Name

Street Address:

City:

State: ZIP code:

Phone Number:

Relationship to Enrollee:

Section 2 – All fields in this section are optional

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

Do you work? Yes No Does your spouse work? Yes No

List your Primary Care Physician (PCP) or clinic:

Physician Name or Clinic Name:

Physician ID #:

Physician Group Name:

Current Patient? Yes No

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

Spanish Chinese

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

Braille Large Print Audio CD

Please contact Blue Shield Customer Care at **(800) 776-4466 (TTY: 711)** if you need information in an accessible format or language other than what is listed above. For members enrolled in D-SNP plans, please contact D-SNP Customer Care **(800) 452-4413 (TTY: 711)**. Our office hours are 8 a.m. to 8 p.m., seven days a week.

Are you Hispanic, Latino/a, or Spanish origin? Select all that apply.

- No, not of Hispanic, Latino/a, or Spanish origin.
 Yes, Puerto Rican. Yes, Cuban. Yes, another Hispanic, Latino, or Spanish origin.
 Yes, Mexican, Mexican American, Chicano/a I choose not to answer.

What's your race? Select all that apply.

- | | | |
|---|--|---|
| <input type="checkbox"/> American Indian or Alaska Native | <input type="checkbox"/> Guamanian or Chamorro | <input type="checkbox"/> Other Pacific Islander |
| <input type="checkbox"/> Asian Indian | <input type="checkbox"/> Japanese | <input type="checkbox"/> Samoan |
| <input type="checkbox"/> Black or African American | <input type="checkbox"/> Korean | <input type="checkbox"/> Vietnamese |
| <input type="checkbox"/> Chinese | <input type="checkbox"/> Native Hawaiian | <input type="checkbox"/> White |
| <input type="checkbox"/> Filipino | <input type="checkbox"/> Other Asian | <input type="checkbox"/> I choose not to answer |

Paying your plan premiums

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)**.

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

I get monthly benefits from: Social Security RRB

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

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.

Producer information: Producer name and ID or NPN is required.

Agency name: _____
(please print appointed agency name)

Agency ID #: _____
(please print agency tax ID)

Producer (writing agent) name (required): _____
(please print writing agent name)

Producer ID #: _____
(please print agent tax ID number)

Producer (writing agent) NPN or TIN (one required): _____
(please print NPN or TIN number)

Producer phone number: _____

Producer email address: _____

Date application received by producer: _____

Producer signature: _____

With my signature, I hereby certify that I have read and understand the CMS Medicare Communications and Marketing Guidelines and Enrollment rules and confirm that the enrollee has received a complete enrollment kit. I agree that this enrollment of a Medicare beneficiary, on behalf of Blue Shield of California, has complied with these rules.

Blue Shield of California is an HMO and an HMO D-SNP plan with a Medicare contract and a contract with the California State Medicaid Program. Enrollment in Blue Shield of California depends on contract renewal.

Privacy Act Statement

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

Typically, you may enroll in a Medicare Advantage plan only during the annual enrollment period from October 15 through December 7 of each year. There are exceptions that may allow you to enroll in a Medicare Advantage plan outside of this period.

Please read the following statements carefully and check the box if the statement applies to you. By checking any of the following boxes you are certifying that, to the best of your knowledge, you are eligible for an Enrollment Period. If we later determine that this information is incorrect, you may be disenrolled.

- I am new to Medicare.
- I am enrolled in a Medicare Advantage plan and want to make a change during the Medicare Advantage Open Enrollment Period (MA OEP).
- I recently moved outside of the service area for my current plan, or I recently moved, and this plan is a new option for me. I moved on (insert date).

- I recently was released from incarceration. I was released on (insert date).

- I recently returned to the United States after living permanently outside of the U.S. I returned to the U.S. on (insert date).

- I recently obtained lawful presence status in the United States. I got this status on (insert date).

- I recently had a change in my Medicaid (newly got Medicaid, had a change in level of Medicaid assistance, or lost Medicaid) on (insert date).

- I recently had a change in my Extra Help paying for Medicare prescription drug coverage (newly got Extra Help, had a change in the level of Extra Help, or lost Extra Help) on (insert date).

- I have both Medicare and Medicaid (or my state helps pay for my Medicare premiums) or I get Extra Help paying for my Medicare prescription drug coverage, but I haven't had a change.
- I am moving into, live in, or recently moved out of a Long-Term Care Facility (for example, a nursing home or long-term care facility). I moved/will move into/out of the facility on (insert date).

- I recently left a PACE program on (insert date).

- I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on (insert date).

- I am leaving employer or union coverage on (insert date).

- I belong to a pharmacy assistance program provided by my state.
- My plan is ending its contract with Medicare, or Medicare is ending its contract with my plan.
- I was enrolled in a plan by Medicare (or my state) and I want to choose a different plan. My enrollment in that plan started on (insert date).

- I was enrolled in a Special Needs Plan (SNP) but I have lost the special needs qualifications required to be in the plan. I was disenrolled from the SNP on (insert date).

- I was affected by an emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA) or by a Federal, state or local government entity. One of the other statements here applied to me, but I was unable to make my enrollment request because of the disaster).
- I'm in a plan that was recently taken over by the state or territorial regulatory authority because of financial issues. I want to Switch to another plan.
- I'm in a plan that had a star-rating less than 3 stars for the last 3 years. I want to join a plan with a star rating 3 stars or higher.
- I am new to Medicare AND Medicare entitlement was made retroactively so I was notified about getting Medicare after my Part A and/or B effective date.

If none of these statements applies to you or you're not sure, please contact Blue Shield of California at **(888) 534-4263 (TTY: 711)** or Authorized Agent, to see if you are eligible to enroll. We are open 8 a.m. to 8 p.m. seven days a week from October 1 through March 31 and 8 a.m. to 8 p.m., Monday through Friday, from April 1 to September 30.