(DO NOT STAPLE)

Employee Enrollment Form

UnitedHealthcare

UnitedHealthcare Insurance Company
Optimum Choice, Inc.
UnitedHealthcare of the Mid-Atlantic, Inc.

To speed the enrollment process, please be thorough and fill out all sections that apply.

To Be Completed by Employer

Requested Effective Date of Coverage/Date of Change / /

Group Name Walton Funding LLC

Policy Number 07Y6777

Date of Hire / /

Position/Title

Hours Worked per week

Salary $______ Required only if Life, STD, or LTD Plan based on salary

Reason for Application
- ☐ New Group Plan
- ☐ Life Event/Date______
- ☐ Status Change______
- ☐ Dependent Add/Delete
- ☐ Change Name/Address
- ☐ Part time to Full time
- ☐ Waiving Coverage
- ☐ Other______
- ☐ New Hire
- ☐ Annual Open Enrollment
- ☐ Late Enrollee
- ☐ Termination

Employee Type (Check all that apply)
- ☐ Active ☐ COBRA ☐ State Continuation Start dt ___/___/___ End dt___/___/___
- ☐ Hourly ☐ Salary
- ☐ Union ☐ Non-Union ☐ Retired
- ☐ Other ______

A. Employee Information

If you are waiving all coverage, please complete sections A and F.

Last Name | First Name | MI | Social Security Number ___ – __ – ____

Address | Apt # | City | State | Zip Code | Home/Cell Phone

Date of Birth / / | Gender ☐ M ☐ F | Email Address | Work Phone

Marital Status ☐ Single ☐ Married ☐ Divorced ☐ Widowed

Language Preference, if not English

Do you use tobacco?[1] ☐ Yes ☐ No
If yes, are you currently participating in a tobacco cessation program or do you intend to join one? ☐ Yes ☐ No

Primary Care Physician[2] Existing Patient? ☐ Yes ☐ No
Physician First & Last Name ______
Address ______
ID# ___|___|___|___|___|___|___|___|___|___|___|___| – |___|___|

Primary Care Dentist[3]
Dentist First & Last Name ______
ID# ______
Existing Patient? ☐ Yes ☐ No

B. Family Information

List All Enrolling (Attach sheet if necessary)

Relationship[4] | Last Name | First Name | MI | Sex ☐ M ☐ F | Date of Birth / /

Spouse /Domestic Partner | Social Security Number ___ – __ – ____

Do you use tobacco?[1] ☐ Yes ☐ No
If yes, are you currently participating in a tobacco cessation program or do you intend to join one? ☐ Yes ☐ No

Primary Care Physician[2] Existing Patient? ☐ Yes ☐ No
Physician First & Last Name ______
Address ______
ID# ___|___|___|___|___|___|___|___|___|___|___|___| – |___|___|

Primary Care Dentist[3]
Dentist First & Last Name ______
ID# ______
Existing Patient? ☐ Yes ☐ No

(1) Tobacco means all tobacco products, including, but not limited to, cigarettes, cigars, and chewing tobacco. You should only check the "yes" box above if tobacco was used four or more times per week on average (excluding religious or ceremonial use) within the past 6 months by someone of legal age to purchase tobacco in the state of residence. (2) For UnitedHealthcare Compass, Navigate, Select, Select Plus, and other products requiring you to choose a Primary Care Physician (PCP), you must use the UnitedHealthcare directory of providers to choose a PCP for yourself and each of your covered dependents. (3) Please see employer representative as some dental plans require a Primary Care Dentist (PCD) selection. (4) For court ordered dependent, legal documentation must be attached. If a dependent does not reside with eligible employee, please provide address on a separate sheet. (5) If you answered "Yes" for Disabled and the dependent child is 26 years of age or older, unmarried, chiefly dependent upon subscriber for support and is not able to be self-supporting because of a physically or mentally disabling injury, illness or condition, please attach a medical certification of disability.

Coverage Provided by "UnitedHealthcare and Affiliates":
Medical coverage provided by UnitedHealthcare Insurance Company, UnitedHealthcare of the Mid-Atlantic,Inc. or Optimum Choice, Inc.
Dental coverage provided by UnitedHealthcare Insurance Company
Life, Short-Term Disability (STD), Long-Term Disability (LTD) Insurance coverage provided by UnitedHealthcare Insurance Company
Vision coverage provided by UnitedHealthcare Insurance Company

Employee Name ______________________________

B. Family/Dependent Information (continued)

List All Enrolling (Attach sheet if necessary)

Relationship[4]	Last Name	First Name	MI	Sex ☐ M ☐ F	Date of Birth / /
Dependent	Social Security Number ___ ___ ___ – ___ ___ – ___ ___ ___ ___	Do you use tobacco?[1] ☐ Yes ☐ No If yes, are you currently participating in a tobacco cessation program or do you intend to join one? ☐ Yes ☐ No			

Primary Care Physician[2] Existing Patient? ☐ Yes ☐ No
Physician First & Last Name ______________________
Address ______________________
ID# ___|___|___|___|___|___|___|___|___|___|___|___| – |___|___|

Primary Care Dentist[3] Existing Patient? ☐ Yes ☐ No
Dentist First & Last Name ______________________
ID# ______________________
Permanently disabled and age 26 or older[5] ☐ Yes ☐ No

Relationship[4]	Last Name	First Name	MI	Sex ☐ M ☐ F	Date of Birth / /
Dependent	Social Security Number ___ ___ ___ – ___ ___ – ___ ___ ___ ___	Do you use tobacco?[1] ☐ Yes ☐ No If yes, are you currently participating in a tobacco cessation program or do you intend to join one? ☐ Yes ☐ No			

Primary Care Physician[2] Existing Patient? ☐ Yes ☐ No
Physician First & Last Name ______________________
Address ______________________
ID# ___|___|___|___|___|___|___|___|___|___|___|___| – |___|___|

Primary Care Dentist[3] Existing Patient? ☐ Yes ☐ No
Dentist First & Last Name ______________________
ID# ______________________
Permanently disabled and age 26 or older[5] ☐ Yes ☐ No

Relationship[4]	Last Name	First Name	MI	Sex ☐ M ☐ F	Date of Birth / /
Dependent	Social Security Number ___ ___ ___ – ___ ___ – ___ ___ ___ ___	Do you use tobacco?[1] ☐ Yes ☐ No If yes, are you currently participating in a tobacco cessation program or do you intend to join one? ☐ Yes ☐ No			

Primary Care Physician[2] Existing Patient? ☐ Yes ☐ No
Physician First & Last Name ______________________
Address ______________________
ID# ___|___|___|___|___|___|___|___|___|___|___|___| – |___|___|

Primary Care Dentist[3] Existing Patient? ☐ Yes ☐ No
Dentist First & Last Name ______________________
ID# ______________________
Permanently disabled and age 26 or older[5] ☐ Yes ☐ No

Relationship[4]	Last Name	First Name	MI	Sex ☐ M ☐ F	Date of Birth / /
Dependent	Social Security Number ___ ___ ___ – ___ ___ – ___ ___ ___ ___	Do you use tobacco?[1] ☐ Yes ☐ No If yes, are you currently participating in a tobacco cessation program or do you intend to join one? ☐ Yes ☐ No			

Primary Care Physician[2] Existing Patient? ☐ Yes ☐ No
Physician First & Last Name ______________________
Address ______________________
ID# ___|___|___|___|___|___|___|___|___|___|___|___| – |___|___|

Primary Care Dentist[3] Existing Patient? ☐ Yes ☐ No
Dentist First & Last Name ______________________
ID# ______________________
Permanently disabled and age 26 or older[5] ☐ Yes ☐ No

C. Product Selection

Please check the box for each coverage in which you or your dependents are enrolling.
If your employer offers a choice of plans, indicate which plan you are selecting. Indicate the dollar amount selected for the Life and Accidental Death & Dismemberment (AD&D), Supplemental Life, Short-Term Disability (STD), and Long-Term Disability (LTD) plans. Benefit offerings are dependent upon employer selection.

Person	Medical	Dental	Vision	Basic Life/AD&D	Supp Life/AD&D
Employee	☐ ________	☐ ________	☐	☐ $________	☐ $________
Spouse [Domestic Partner]	☐	☐	☐	☐ $________	☐ $________
Dependent	☐	☐	☐	☐ $________	☐ $________

Person	STD	LTD
Employee	☐	☐

Life Insurance Beneficiary Full Name and Address (if applying for Life Insurance with UnitedHealthcare)		Relationship
Primary		
Secondary		

Employee Name _____

D. Prior Medical Insurance Information

Within the last 12 months, have you, your spouse, or your dependents had any other medical coverage?
☐ NO ☐ YES (if yes, please complete this section.)

Prior medical carrier name _____ Effective date ___ ___ ___ End date ___ ___ ___

Prior coverage type: ☐ Employee ☐ Spouse ☐ Child(ren) ☐ Family

E. Other Medical Coverage Information

This section must be completed. (Attach sheet if necessary.)

On the day this coverage begins, will you, your spouse or any of your dependents be covered under any other medical health plan or policy, including another UnitedHealthcare plan or Medicare? ☐ YES (continue completing this section) ☐ NO (skip the rest of this section)

Name of other carrier _____

Other Group Medical Coverage Information (only list those covered by other plan)	Type (B/S/F)*	Effective Date MM/DD/YY	End Date MM/DD/YY	Name and date of birth of policyholder for other coverage
Employee:				
Spouse Name:				
Dependent Name:				
Dependent Name:				
Dependent Name:				

*B. Enter 'B' when this dependent is covered under both you and your spouse's insurance plan (married)
S. Enter 'S' if you are the parent awarded custody of this dependent and no other individual is required to pay for this dependent's medical expenses.
F. Enter 'F' if this dependent is covered by another individual (not a member of your household) required to pay for this dependent's medical expenses.

Medicare – Employee Information: If enrolled in Medicare, please attach a copy of your Medicare ID card.

☐ Enrolled in Part A: Effective Date _____ ☐ Ineligible for Part A* ☐ Not Enrolled in Part A (chose not to enroll)**
☐ Enrolled in Part B: Effective Date _____ ☐ Ineligible for Part B* ☐ Not Enrolled in Part B (chose not to enroll)**
☐ Enrolled in Part D: Effective Date _____ ☐ Ineligible for Part D* ☐ Not Enrolled in Part D (chose not to enroll)**

Reason for Medicare eligibility: ☐ Over 65 ☐ Kidney Disease ☐ Disabled ☐ Disabled but actively at work

Are you receiving Social Security Disability Insurance (SSDI)? ☐ YES ☐ NO Start Date

Medicare – Spouse/Dependent Name: _____

☐ Enrolled in Part A: Effective Date _____ ☐ Ineligible for Part A* ☐ Not Enrolled in Part A (chose not to enroll)**
☐ Enrolled in Part B: Effective Date _____ ☐ Ineligible for Part B* ☐ Not Enrolled in Part B (chose not to enroll)**
☐ Enrolled in Part D: Effective Date _____ ☐ Ineligible for Part D* ☐ Not Enrolled in Part D (chose not to enroll)**

Reason for Medicare eligibility: ☐ Over 65 ☐ Kidney Disease ☐ Disabled ☐ Disabled but actively at work

*Only check "Ineligible" if you have received documentation from your Social Security benefits that indicate that you are not eligible for Medicare.

** If you are eligible for Medicare on a primary basis (Medicare pays before benefits under the group policy), you should enroll in and maintain coverage under Medicare Part A, Part B, and/or Part D as applicable.

F. Waiver of Coverage

I decline all coverage for:
☐ Myself
☐ Spouse
☐ Dependent Children
☐ Myself and all dependents

Declining coverage due to existence of other coverage:
☐ Spouse's Employer's Plan ☐ Individual Plan
☐ Covered by Medicare ☐ Medicaid
☐ COBRA from Prior Employer ☐ VA Eligibility
☐ Tri-Care
☐ I (we) have no other coverage at this time
☐ Other _____

I understand that by waiving coverage at this time, I will not be allowed to participate unless I qualify at a special enrollment period or as a late enrollee, if applicable, or at the next open enrollment period.

Date	Employee Signature if waiving coverage

G. Signature

Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

I authorize UnitedHealthcare Insurance Company and its affiliates (collectively, "UnitedHealthcare") to obtain, use and disclose my medical, claim or benefit records, including any individually identifiable health information contained in these records. I understand these records may contain information created by other persons or entities (including health care providers) as well as information regarding the use of drug, alcohol, HIV/AIDS, mental health (other than psychotherapy notes), sexually transmitted disease and reproductive health services. I authorize any health care provider, pharmacy benefit manager, other insurer or reinsurer, hospital, clinic or other medical facility, health care clearinghouse, and any of their affiliates, representatives or business associates, to disclose my information to UnitedHealthcare and Affiliates. I understand that the purpose of the disclosure and use of my information is to allow UnitedHealthcare to facilitate the appropriate management of treatment, services, payment and benefits. I further understand that the information disclosed will not be used for purposes of eligibility, enrollment, underwriting and premium risk rating. I understand this authorization is voluntary and I may refuse to sign the authorization. I understand I may revoke this authorization at any time by notifying my UnitedHealthcare representative in writing, except to the extent that action has already been taken in reliance on this authorization. As required by HIPAA, UnitedHealthcare also requires that I acknowledge the following, which I do: I understand that information I authorize a person or entity to obtain and use may be re-disclosed and no longer protected by federal privacy regulations. This authorization, unless revoked earlier, expires 30 months after the date it is signed.

I understand that I am completing a joint life and health application and that each response must be complete and accurate. I (we) request the indicated group medical coverage. I authorize any required premium contributions to be deducted from my earnings. I (we) have not given the agent or any other persons any required information not included on the application. I (we) understand that UnitedHealthcare is not bound by any statements I (we) have made to any agent or to any other persons, if those statements are not written or printed on this application and any attachments.

Please note that if you leave out information or make a misrepresentation on this form we may be allowed by law to take one or more of the following actions: terminate or non-renew your coverage or change your premium retroactively to the date your policy became effective.

Please maintain a copy of this authorization for your records.

Date	Employee Signature for all applying	Spouse Signature (if applying for coverage)

H. Census Information (optional)

NOTE: Responding to this question is optional and is not required. Data collected in this section will be used only to help communicate with enrollees and inform them of specific programs to enhance their well-being. This information will not be used in the eligibility process.

1. Race, check all that apply: ☐ White ☐ Black, African-American ☐ American Indian/Alaska Native ☐ Asian ☐ Native Hawaiian/Pacific Islander ☐ Other Race, please specify_____

2. Are you of Hispanic or Latino origin? ☐ Yes ☐ No