Application Submission Instructions

Please complete the attached application and send to HealthPlanOne either via fax or mail:
(must submit by mail if enclosing a check or money order)

HealthPlanOne
35 Nutmeg Drive, Suite 220
Trumbull, CT 06611

Fax (Toll Free): 888.812.6887

Please make check payable to the carrier to which you are applying.

Any questions? Please call HealthPlanOne at 1-877.567.5267. Thank you!

UNITEDHEALTHCARE LIFE INSURANCE COMPANY
Application for Insurance

SECTION 1
Applicant(s) Information - Must Be Completed by the Applicant(s)

Please Print In Black Ink

1. REASON FOR APPLICATION:

☐ New Application ☐ Add a dependent Current ID Number (for additions)

2. PRIMARY APPLICANT'S INFORMATION:

a. Name (Last, First, M.I.): _____

b. **Resident Physical Address (where you live and pay taxes). PO Boxes are not accepted.**

Street (Include Apt.)

City State ZIP

c. **Mailing Address (if different than above).**

Street (Include Apt.)

City State ZIP

d. County of Residence _____

e. Phone Numbers ( ) ( )
Home Other Best number and time to call

f. Email Addresses _____
Primary Applicant Spouse

g. Payor _____
(If not You) Name Email Address

Street City State ZIP

h. Marital Status: ☐Married ☐Single

3. APPLICANTS FOR COVERAGE: Please list only those persons needing coverage.

Gender	Name (Last, First, M.I.)	Social Security No.	Birth Date
☐Male ☐Female	a. Primary (You)		
☐Male ☐Female	b. Spouse		
☐Male ☐Female	c. Child		
☐Male ☐Female	d. Child		
☐Male ☐Female	e. Child		
☐Male ☐Female	f. Child		
☐Male ☐Female	g. Child		

If you need to list additional dependents, please use lined paper, sign and date it, and check this box. ☐

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4. Are all applicants United States citizens or nationals? ..... ☐ YES ☐ NO

(If no, indicate who below and provide the requested information for that person.)

Applicant (same as in Question 3)	Document Type (i.e. Reentry Permit (I-326), Permanent Resident Card (Green Card I-551), etc.)	Document ID Number
☐ a. Primary		
☐ b. Spouse		
☐ c. Child		
☐ d. Child		
☐ e. Child		
☐ f. Child		
☐ g. Child		

5. In the last 6 months, has any applicant smoked cigarettes or used tobacco in any form (including smokeless tobacco) 4 or more times per week on average, excluding religious or ceremonial uses? ☐ YES ☐ NO

(If yes, indicate who.)

☐ a. Primary ☐ b. Spouse ☐ c. Child ☐ d. Child ☐ e. Child ☐ f. Child ☐ g. Child

SECTION 2

Product Selection & Billing (or attach a health insurance quote). Complete for new applications only.

Requested Effective Date
__ __/__ __/__ __ __ __

Copay Plans
- ☐ Bronze Copay Select℠ 1
- ☐ Bronze Copay Select℠ 2
- ☐ Silver Copay Select℠ 1
- ☐ Silver Copay Select℠ 2
- ☐ Silver Copay Select℠ 3
- ☐ Gold Copay Select℠

HSA Plans
- ☐ Bronze HSA 100®
- ☐ Silver HSA 100®

Catastrophic Plan
- ☐ Select Saver℠

Base Premium Amount *(includes taxes and fees)* $ _____

☐ HSA Deposit + _____

Total Monthly Payment
(Payable to UnitedHealthcare Life Insurance Company) = $ _____

If Quarterly, Total Monthly Payment x 3
(Payable to UnitedHealthcare Life Insurance Company) = $ _____

6. Payment:

Initial Payment with Application: ☐ Check ☐ EFT ☐ Credit Card

Ongoing Payments: **Monthly** ☐ EFT ☐ Direct Bill
Quarterly ☐ Direct Bill

IMPORTANT: Electronic Funds Transfer (EFT) and Credit Card payments will be collected on the date we issue coverage, or the effective date of the policy, whichever is later. If Initial Payment is EFT, Ongoing Payment must be EFT. If you choose Check as your Initial Payment Method, please mail your check with your completed application - checks are deposited upon receipt. Premium will be verified and may be adjusted up or down during the processing of your application.

SECTION 3

Medicare Status

7. Is any applicant covered by Medicare? ..... ☐ YES ☐ NO

(If yes, list names below.)

Applicant's Name	Applicant's Name	Applicant's Name

SECTION 4

Special Enrollment

Complete this section only if applying due to a qualifying event.

8. You may be eligible for health insurance coverage under a Special Enrollment Period if you experienced at least one of the following events: (Check all that apply and provide the requested information.)

☐ a. Marriage

i. Date of marriage? (MM/DD/YYYY) ___/_____/____

☐ b. Gained a dependent or became a dependent

i. Date of event (MM/DD/YYYY) ___/_____/____

ii. Type of event (Check one)

☐ Birth

☐ Adoption

☐ Legal guardianship

☐ Foster care placement

☐ Child support or other court order

☐ c. Involuntary loss of prior health coverage that was minimum essential coverage and all of the following statements are true:

- Loss of coverage was not due to failure to pay premium or termination for fraud.
- Prior coverage was not short term medical insurance.
- If prior coverage was COBRA, I have exhausted COBRA benefits.
- Termination Date of prior coverage (MM/DD/YYYY) ___/_____/____

☐ d. Prior health plan was a non-calendar year plan that renewed or will renew on the date below

i. Renewal Date (MM/DD/YYYY) ___/_____/____

☐ e. Moved to a new physical resident address and now eligible for new health plan

i. Date of move (MM/DD/YYYY) ___/_____/____

ii. Prior resident address

_____ | | | | | | | | | |

Street City State ZIP

If you have experienced a recent event that is not listed above and you believe you may qualify for a Special Enrollment Period, please check "Other" below and provide an explanation.

☐ f. Other (Please explain.) _____

_____

If you checked c., d., or e. above, please complete the following:

i. Type of prior coverage (Check one)

☐ Individual ☐ Employer Group ☐ COBRA ☐ Medicaid ☐ Other

ii. Prior coverage Insurance Company Name _____

iii. Prior coverage Insurance Company Phone Number _____

iv. Primary Insured/Member's Name _____

v. Primary Insured/Member's ID Number _____

vi. Were all persons applying for coverage covered by the plan identified above as of the date specified in c., d., or e.? ☐ YES ☐ NO If you checked "No," who was **not** covered?

_____

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SECTION 5

Statement of Understanding - Review the completed application and read the section below carefully before signing.

I personally completed this application. I represent that the answers and statements on it are true, complete, and correctly recorded.

I understand and agree that:

(1) This application and the initial payment do not give me immediate coverage.

(2) I will be the sole source of payment of premium. There is and will be no direct or indirect contribution or reimbursement by or on behalf of any health care provider, health care provider sponsored organization, employer, business, or any other entity for any portion of the premium for coverage under this policy, unless specifically approved in writing by UnitedHealthcare. If self-employed, I may use a business check for my personal insurance.

(3) I should not terminate existing coverage until I have accepted the UnitedHealthcare Life Insurance Company coverage.

(4) **Incorrect or incomplete information on this application may result in claim denial. Intentional misrepresentation of a material fact or any omission that constitutes fraud may result in voidance of coverage.**

(5) This completed application, and any supplements or amendments, will be a part of any policy, if issued.

(6) The broker may only submit the application and initial payment, and may not promise me coverage, modify UnitedHealthcare Life's underwriting policy or terms of coverage, or change or waive any right or requirement.

(7) I represent that I have made such investigations as are necessary to assure the truth and accuracy of all statements made in this application regarding all listed dependents.

(8) If UnitedHealthcare Life rejects this application, under no circumstances will any benefits be payable. Receipt of money, cashing of my check, or charging my credit card by UnitedHealthcare Life does not constitute approval of my application or create UnitedHealthcare Life coverage.

(9) The policy requires some medical services to be authorized by UnitedHealthcare Life or its representative before the services are provided, and benefits for these services may be reduced if the prior authorization is not obtained.

I have received a Notice of Information Practices and a Conditions Prior to Coverage.

X _____ / / X _____

Primary Applicant (You) Date Spouse (if to be covered)

X _____

Parent/Guardian (for any applicant/dependent who is a minor) Relationship

Broker Statement: Review the completed application before signing below.

Each question on the application was completed by the applicant(s). The applicant has received a Notice of Information Practices and a Conditional Receipt or Conditions Prior to Coverage.

X _____ X WILLIAM C. STAPLETON

Signature of Licensed Broker Print Full Name

8577379

Broker Number

SALES@HEALTHPLANONE.COM

Broker Email Address

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Primary Care Physician Selection: **Please select a Primary Care Physician (PCP) from our network who is in your state of residence. If no PCP is listed, we will assign one to you. See our Physician Listing at uhone.com (Find a Doctor).**

	Physician's Name	Phone Number	Office Address	City	State	ZIP
a. Primary (You)					MO	
b. Spouse					MO	
c. Child					MO	
d. Child					MO	
e. Child					MO	
f. Child					MO	
g. Child					MO	

If you need to list Primary Care Physicians for additional dependents, please use lined paper, sign and date it, and check this box. ☐

Authorization to Obtain and Disclose Nonmedical Information

I authorize UnitedHealthcare Life Insurance Company to obtain information that they need to verify my application for insurance. Any employer, insurance company, government agency, or consumer-reporting agency having information about my occupation(s), avocations, driving history, criminal history, or prior insurance coverage for my family or me is authorized to give it to UnitedHealthcare Life Insurance Company.

I (we) have received UnitedHealthcare Life Insurance Company's Notice of Information Practices. This authorization shall remain valid for 30 months from the date below.

I (we) understand the following: A photocopy of this authorization is as valid as the original. I (we) or my (our) authorized representative may obtain a copy of this authorization by writing to UnitedHealthcare Life Insurance Company. I (we) may request revocation of this authorization by writing to UnitedHealthcare Life Insurance Company, as explained in UnitedHealthcare Life Insurance Company's Notice of Information Practices. UnitedHealthcare Life Insurance Company may condition enrollment in its health plan or eligibility for benefits on my (our) refusal to sign this authorization. The information that is used or disclosed in accordance with this authorization may be redisclosed by the receiving entity and may no longer be protected by federal or state privacy laws.

ADNI-UL-1013

I have read the above: Authorization to Obtain and Disclose Nonmedical Information.

X _____ / / _____
Primary Applicant (You) Date

X _____
Spouse (if to be covered)

X _____
Parent/Guardian (if you are a minor) Relationship

Parent/Guardian Information **(if application is for child(ren) only)**

Parent/Guardian Name Email Address

Street City State ZIP

Payor Phone Number **(if not you)**

( )
Contact Number

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Health Savings Account (HSA) application — Only if opening an HSA with Optum Bank

By signing to the right, I acknowledge that:

- I wish to establish a health savings account (HSA) with Optum Bank as custodian.
- I understand the eligibility requirements for deposits made to my HSA and state that I qualify to make deposits to this account. I have reviewed this application and understand and agree that my HSA will be opened under and governed by Optum Bank's Custodial and Deposit Agreement and that the terms and conditions therein will be binding on me. This document will be sent to me when my account is opened, along with Optum Bank's Privacy Policy and Schedule of Fees.
- I authorize Optum Bank to provide information about my HSA, including my account number, to UnitedHealthcare Life Insurance Company, and those acting on behalf of UnitedHealthcare Life Insurance Company or Optum Bank (if applicable), in connection with the establishment and maintenance of my HSA.
- I acknowledge that UnitedHealthcare Life Insurance Company and all others acting on behalf of UnitedHealthcare Life Insurance Company, may provide information on my behalf to establish and maintain my HSA and authorize UnitedHealthcare Life Insurance Company and its designee to take such action deemed necessary and appropriate by UnitedHealthcare Life Insurance Company to administer my HSA, including but not limited to, making deposits and correcting errors where necessary.
- I understand my monthly account statements will be made available to me electronically. I agree to notify Optum Bank if I wish to have statements mailed to my home address.
- I have requested a MasterCard Prepaid Debit Card and if I have filled out the information to request an Authorized User debit card, I hereby request Optum Bank to issue a debit card on my account to the person indicated and I acknowledge I will be liable for the use of the debit card by the Authorized User.
- I authorize Optum Bank to share information about my HSA with the Authorized User named, and to allow any account transactions made by such Authorized User.
- I certify that the information provided in this application is true and complete.

X _____

Signature of Primary Applicant

Primary Applicant's Social Security No. | | | | | | | | | |

Applicant's Spouse Social Security No. | | | | | | | | | |

Per the USA Patriot Act: To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. When you open the account, we will ask for your name, street address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

REQUEST FOR AN AUTHORIZED USER DEBIT CARD (OPTIONAL)

Authorized User's _____
First Name Middle Initial

Authorized User's _____
Last Name

Authorized User's _____
Date of Birth

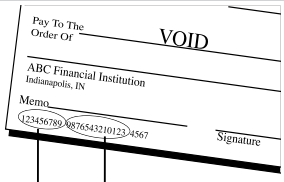
Authorized User's | | | | | | | | | |
Social Security No.

HSA-UL-1013

Electronic Funds Transfer (EFT) Authorization — Only if paying by EFT

I (we) hereby authorize UnitedHealthcare Life Insurance Company to initiate debit entries to the account indicated below. I also authorize the named financial institution to debit the same to such account.

I agree this authorization will remain in effect until you actually receive written notification of its termination from me.



Type of Account: ☐ Checking ☐ Savings

Nine-digit Routing No. | | | | | | | | | |

Account No. | | | | | | | | | | | | | | | | |

Financial Institution's Name _____

Address _____

City, State, ZIP _____

Draft On _____ _____
Day Date Signed

In Tennessee and Texas, drafts may only be scheduled on 1) the premium due date; or 2) up to 10 days after the due date.

X _____

Authorized Account Signature

EFTTI-UL-0216

Initial Payment Credit Card Authorization

I authorize UnitedHealthcare Life Insurance Company to bill my American Express/MasterCard/Visa account for the Initial Payment. **If quarterly billing requested, the Initial Payment will be for three months plus any one-time costs.**

Type of Card: ☐ MasterCard ☐ Visa ☐ American Express

Exp. Date: | | | Month | | | Year

Billing ZIP Code: | | | | | |

Card Number: | | | | | | | | | | | | | | | | |

X _____

Signature of Authorized User

NOTE: Some card issuers/financial institutions charge cash advance fees on insurance payments.

CCTI-UL-1013

UnitedHealthcare Form 1095-B Electronic Delivery Consent Notice

This notice is for electronic delivery of Form 1095-B only. Your consent will stay in place until you tell us that you don't want to get Form 1095-B electronically.

What is Form 1095-B?

This is the IRS form that you will need when you file your federal income tax return to show that you have minimum essential coverage (MEC). The form shows this information about your health coverage:

- Type of coverage you had
- Period of coverage
- Who was covered (including dependents)

Electronic delivery of Form 1095-B

You agree to receive Form 1095-B electronically instead of receiving a paper copy. If you also want a paper copy, call the number on your health plan ID card. We will keep sending future forms electronically.

You may print Form 1095-B to use when completing your tax return.

You may have already agreed to get other communications electronically. We need you to also agree to get Form 1095-B electronically.

To stop getting electronic delivery of Form 1095-B and to get a paper copy

You can stop getting electronic delivery of Form 1095-B at any time and choose to get a paper copy. To do this:

1. Log in to myuhone.com
2. Then click "Profile", then "Account Information" and you'll be able to reset your mailing and email preferences. You will get a confirmation of the change. You can also change these preferences by clicking the "Account Settings for Document Delivery", located on the home page.

You may also send your request in writing to:

UnitedHealthcare
PO Box 31372
Salt Lake City, UT 84131-0372

Be sure to include the following information with your request:

- Primary insured's name
- Date of your request
- Primary insured's email address
- Policy ID Number
- And make sure you sign the request

You can also ask for a free paper copy of Form 1095-B by calling the member phone number on your health plan ID card. We will stop sending Form 1095-B electronically on the date that you tell us not to send it electronically. This will not affect statements that were already provided to you electronically.

Undeliverable Emails

We will notify you via the email address you give us, that your Form 1095-B is available. If we get a message that the email is undeliverable, we will assume that you don't want electronic delivery anymore. We will send a paper copy of Form 1095-B to you. To update your email address:

1. Log in to myuhone.com
2. Then click "Profile", then "Account Information" and you'll be able to reset your mailing and email preferences. You will get a confirmation of the change. You can also change these preferences by clicking the "Account Settings for Document Delivery", located on the home page.

To be sure that you can receive emails from us, add the UnitedHealthcare email address to your email address book or safe list.

If your UnitedHealthcare health plan terminates

If your plan terminates, you will receive Form 1095-B from UnitedHealthcare for the months you had coverage with us.

Requirements to Receive and Keep Electronic Information

To receive and keep electronic information, you must have access to a computer or other device that can get to the Internet and a printer. You must have an email address. Also, you must have Adobe Acrobat Reader® version 6.0 or higher which lets you open Portable Document Format or "PDF" files.

Form 1095-B is available for three years from the year the form was issued.

_____ Primary Applicant's Name	_____ Primary Applicant's Email Address
X _____ Primary Applicant's Signature	_____ Date
_____ Parent/Guardian (if you are a minor)	_____ Parent/Guardian Email Address
X _____ Parent/Guardian Signature	