

## Aetna Medicare 2025 Individual Enrollment Request Form Instructions

How to enroll

OMB No. 0938-1378 Expires 6/30/2026

Call us at: 1-833-771-2456 (TTY: 711) Through your agent:
Give them the completed form

Fax to: Attention: Enrollment Department Fax: 1-866-756-5514 **Mail** to: Aetna Medicare PO Box 7405 London, KY 40742

## **Get ready**

### Have the following handy:

- Your red, white and blue Medicare insurance card
- Your health insurance information for any other insurance you have (including Medicaid)
- Your primary care provider's information which is available online at **AetnaMedicare.com/findprovider**

### **Questions?**

Call us at **1-833-771-2456 (TTY: 711)**. We're here 8 AM to 8 PM, seven days a week, from October 1 to March 31 and 8 AM to 8 PM, Monday through Friday, from April 1 to September 30.

## Tips for your enrollment request

- Each applicant must complete their own enrollment. Please don't photocopy a form for reuse.
- Please print neatly. Complete all sections. Don't forget to sign and date the form.
- For individuals experiencing homelessness: If you want to join a plan but have no permanent residence, a Post Office Box, the address of a shelter or clinic, or the address where you receive mail (for example, Social Security checks) may be considered your permanent residence address.
- If you enroll outside the Annual Enrollment Period (AEP) timeframe, you must confirm your enrollment period (see next page).
- Make a copy of the completed application for your records.
- We recommend you confirm your form was received if you fax or mail it (for example, call us to confirm receipt or send certified mail).

Thank you for choosing our plan. You'll hear from us within 10-14 days.



## **Confirm your enrollment period**

Typically, you may enroll in a Medicare Advantage Plan during the Annual Enrollment Period (AEP) 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.

Read the following statements carefully and check the box if the statement applies to you. By checking a box you certify 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.

Prospective member name	Medicare Number — — — - — — - — — — —
Reason for Annual Enrollment Period Eligibility	
☐ I'm enrolling between 10/15/24-12/7/24 during the	current Annual Enrollment Period.
Reasons for Initial Enrollment Period Eligibility	
☐ I'm new to Medicare.	
☐ I'm new to Medicare, and I was notified about getti coverage started. I was notified on//	
☐ I had Medicare prior to now, but I'm now turning 65	5.
Reasons for Open Enrollment Period Eligibility	
Between 1/1/25 and 3/31/25:	
☐ I'm in a Medicare Advantage plan and want to mak	e a change.
Between 4/1/25 and 12/31/25:	
☐ I'm in a Medicare Advantage plan and have had Mechange.	edicare for less than 3 months. I want to make a
Reasons for Special Enrollment Period Eligibility	
☐ I moved to a new address that's outside my current this plan is a new option for me. I moved on/_	•
☐ I was released from jail. I was released on/	_/ (date).
☐ I moved back to the United States after living outside/(date).	de the country. I returned to the U.S. on
$\ \square$ I recently got lawful presence status in the United S	States. I got this status on// (date).
☐ I recently had a change in my Medicaid (newly got assistance, or lost Medicaid) on/ (da	
☐ I recently had a change in my Extra Help paying for change in the level of Extra Help, or lost Extra Help	
	Continued on next page

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Pr	•	edicare Number 		
_				
Re	Reasons for Special Enrollment Period Eligibility (continued)			
	<ul> <li>I have both Medicare and Medicaid, my state helps pay for n Help paying my Medicare drug coverage.</li> </ul>	ny Medicare premiums, or I get Extra		
	□ I dropped my coverage in a PACE (Programs of All-Inclusive/ (date).	Care for the Elderly) plan on		
	$\ \square$ I live in a long-term care facility, like a nursing home or a reh	abilitation hospital.		
	I recently moved out of a long-term care facility, like a nursin moved out of the facility on/ (date).	g home or rehabilitation hospital. I		
	<ul> <li>I lost other, non-Medicare drug coverage (creditable coverage coverage changed and is no longer considered creditable company in the coverage changed and is no longer considered creditable coverage.</li> </ul>	<b>9</b>		
ं	$\ \square$ I left coverage from my employer or union (including COBRA	a coverage) on// (date).		
	<ul> <li>I'm in a State Pharmaceutical Assistance Program, or I am lo Assistance Program.</li> </ul>	sing help from a State Pharmaceutical		
	<ul> <li>I lost my coverage because my plan no longer covers the are with Medicare.</li> </ul>	ea that I live or it ended its contract		
	□ I was enrolled in a plan by Medicare (or my state) and I want enrollment in that plan started on// (date).	to choose a different plan. My		
	☐ I lost my Special Needs Plan because I no longer have a condisenrolled from the plan on/ (date).	dition required for that plan. I was		
	I was affected by an emergency or major disaster (as declar Management Agency, or by Federal, my state or my local go statements applied to me, but I was unable to make my requ	vernment). One of the other		
Ġ.	$\ \square$ I want to join a Special Needs Plan that tailors its benefits to	my chronic condition.		
all da	If none of these statements above apply to you, but you feel you have a special circumstance which allows you to enroll, you can call us at <b>1-833-771-2456 (TTY: 711)</b> . We're here 8 AM to 8 PM, seven days a week, from October 1 to March 31 and 8 AM to 8 PM, Monday through Friday, from April 1 to September 30. We can help you to determine if you qualify for a Special Election Period.			
	Otherwise, note the reason for your Special Election period below. Aetna may contact you to determine if you're eligible.			
	□ Other SEP Reason:			

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## **Enrollment Request Form**

Agent Use Only:
Agent Name:
NPN#:

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To enroll in an Aetna plan, please provic	le the following information:
Choose your plan	
Check the plan you want to enroll in.	
□ *Aetna Medicare Prime Chronic Care (HMO C- (H1206-004)	-SNP) <b>\$0.00</b> per month
□ *Aetna Medicare Prime Chronic Value (HMO C (H1206-005)	C-SNP) <b>\$22.80</b> per month
Note: Plans with an asterisk ( * ) next to the plan nassigned. See the <b>Choose your Primary Care Pro</b>	
& Medicaid Services' regulations. Unless you are	_/ od you're using to enroll and the Centers for Medicare new to Medicare or are eligible for a Special Election 1. Aetna cannot guarantee the effective date you've
(*) next to the plan name (Example: "*Aetna Prin	a PCP. We have noted these plans with an asterisk me Plan (HMO)"). If you selected a plan noted with an pay for your care and will assign a PCP to you. <b>Please</b>
If the plan you have selected does NOT have an option to choose a PCP. When we know who you	asterisk ( * ) next to the plan name, you still have the ur doctor is, we can better support your care.
•	re ID of your primary care provider (PCP) below. Visit .com/findprovider or call 1-833-771-2456 (TTY: 711) r your specific plan selection.
Full name of your PCP (first and last name)	Are you a current patient?
	□ Yes □ No
<b>Provider ID</b> (located in the provider directory)	
<b>Primary Care ID</b> (located in the provider directory)	

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Last name		First	name			Middle initial
Birth date  M M D	D / Y Y Y	Sex  M Y		Phone number (		
Email addres	SS .	<u> </u>				_
Individuals ex			_	pt/Suite/Unit (Don' PO Box. The plan wil		
City		Cour	nty		State	ZIP code
Mailing addr	Mailing address - including Apt/Suite/Unit (if different from your permanent street address)					
City					State	ZIP code
Y		s on your re	d, white	information and blue Medicare in t B to join a Medicare		plan.
Medicare Nu	ımber:			HOSPITAL (Part A)	/	_/
				MEDICAL (Part B)	/	_/
Answer the	ese important qu	uestions			_	
□ Yes □ No	Some individu TRICARE, Fec pharmaceutic	uals may hav leral employ cal assistanc ation (ID) nui	ve other vee healt ce progra	drug coverage in ac drug coverage, inclu th benefits coverage, ams. If "Yes," please of for this coverage:	ding other p VA benefits	orivate insurance, s, or state
	ID # for this cover	_				
	Group # for this c	_				
□ Yes □ No	2. <b>Are you enro</b> If "Yes," write in yo	-		Medicaid program? er:		

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# Please tell us a little more about yourself

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

Are you of Hispanic, Latino/a, or Spanish origin? Select all that apply.				
□ No, not of Hispanic, Latino/a, or Sp	oanish origin	□ Yes, Mex	cican, Mexican American, Chicano/a	
☐ Yes, Puerto Rican		□ Yes, Cub	an	
☐ Yes, another Hispanic, Latino/a, or origin	Spanish	□ I choose	not to answer.	
What's your race? Select all that appl	y.			
□ American Indian or Alaska Native	☐ Asian India	n	□ Black or African American	
□ Chinese	□ Filipino		☐ Guamanian or Chamorro	
□ Japanese	□ Korean		□ Native Hawaiian	
□ Other Asian	□ Other Pacif	ic Islander	□ Samoan	
□ Vietnamese	□ White		☐ I choose not to answer.	
What is your gender? Select one.				
□ Woman	□ Non-binary	•	☐ I choose not to answer.	
□ Man	□ I use a diffe	I use a different term:		
Which of the following best represen	ts how your thi	nk of yoursel	f? Select one.	
□ Lesbian or gay	□ Bisexual		□ Not sure	
☐ Straight, that is, not gay or ☐ I use a different lesbian		erent term:	☐ I choose not to answer.	
Indicate your <b>preferred spoken language</b> (if not English):				
☐ Spanish ☐ Chinese ☐ Other (please specify):				
Indicate your <b>preferred written language</b> (if not English):				
□ Spanish □ Chinese □ Other (please specify):				
Select one if you want us to send yo	ou information	in an access	sible format:	
□ Braille □ Large print □ Audio CD □ Data CD				
Please call us at <b>1-833-771-2456 (TTY: 711)</b> if you need information in an accessible format other than what's listed above. We're here 8 AM to 8 PM, seven days a week, from October 1 to March 31 and 8 AM to 8 PM, Monday through Friday, from April 1 to September 30.				

## Paying your plan premiums

Let us know how you want to pay your monthly plan premium (including any late enrollment penalty you may owe). Please select an option even if your plan has a \$0 premium. If you don't select a payment option, we'll automatically send you an invoice each month.

## Electronic Funds Transfer (EFT) from checking or savings account

- You won't need to remember to send in a check each month.
- The money is automatically taken from your account on the 10<sup>th</sup> of each month (or the following business day).
- We will withdraw the total amount due on your account. This includes your current monthly premium payment, as well as any past due payments at the time of the monthly draft.

	Please complete the following: Account holder name:
	(Print the name as it appears on the account to be debited.)
	Bank name:
Sig	DUTING NUMBER ACCOUNT NUMBER Account type:  Checking Checking Savings  Gnature of account holder: (if different than enrollee)  gree that this authorization will remain in effect until I provide written notification terminating this rvice.
	Automatic deduction from my Social Security Administration (SSA) or Railroad Retirement Board (RRB) benefit check.
	I get monthly benefits from: $\Box$ Social Security $\Box$ RRB
	Do <u>not</u> select this option if:
	Another program (such as an Employer Group or State Pharmaceutical Assistance      Program (SPAP)) is paying part of your premium.

- Program (SPAP)) is paying part of your premium.
- You are enrolling in a plan with a \$0 premium and you do not owe a late enrollment penalty.
- You are enrolling in a Dual-Eligible Special Needs Plan (D-SNP) or an Institutional Special Needs Plan (ISNP).
- SSA/RRB will tell us when your premium deduction will start coming out of your SSA/RRB check (this could take up to 3 months). While we wait for your request to process, we'll send you an invoice to pay your premium.
- Sometimes SSA/RRB may not accept the request for deductions from your SSA/RRB check. If this happens, we'll send you an invoice to pay your monthly premium.

### Monthly payments by invoice

- You can mail us a check with your payment slip each month.
- You can go online and pay by debit or credit card after your enrollment in the plan is active.
- You can bring your invoice to any CVS Pharmacy and pay with cash, credit card, or debit card. (This service is not available at CVS Pharmacy at Target or Schnucks Pharmacy locations.)

## Additional notes about payment and options

- Social Security will contact you if you have to pay a Part D-Income Related Monthly Adjustment Amount (Part D-IRMAA). You'll have to pay this extra amount as well as your plan premium. You will either have the amount withheld from your SSA or RRB benefit check, or be billed directly by Medicare or the RRB. Do not send your Part D-IRMAA payment to us.
- Written EFT terminations must be received before the 1<sup>st</sup> of the month of the EFT transaction. EFT transactions will occur on the 10<sup>th</sup> of the month in the amount of the balance due.
- If you owe a late enrollment penalty, you can pay the penalty by EFT, mail or have it taken out of your SSA or RRB benefit check.
- People with limited incomes may qualify for Extra Help to pay for their prescription drug costs. Medicare could pay for 75% or more of your drug costs, including monthly prescription drug premiums, annual deductibles, and co-insurance. Additionally, those who qualify won't have a coverage gap or a late enrollment penalty. Many people qualify for these savings and don't even know it. For more information about this Extra Help, contact your local Social Security office, or call Social Security at 1-800-772-1213 (TTY: 1-800-325-0778). You can also apply for Extra Help online at ssa.gov/medicare/part-d-extra-help.
- If you qualify for Extra Help with your Medicare prescription drug costs, Medicare will pay all or part of your plan premium. If Medicare pays only a portion of this premium, we will bill you for the amount that Medicare doesn't cover.

## Read this important information and sign below

- ' If you currently have health coverage from an employer or union, joining Aetna Medicare could affect your employer or union health benefits. You could lose your employer or union health coverage if you join Aetna Medicare. Read the communications your employer or union sends you. If you have questions, visit their website, or contact the office listed in their communications. If there isn't any information on whom to contact, your benefits administrator or the office that answers questions about your coverage can help.
- I must keep both Hospital (Part A) and Medical (Part B) to stay in Aetna Medicare.
- By joining this Medicare Advantage plan, I acknowledge that Aetna Medicare 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 on the next page).

### **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.
- I understand that I can be enrolled in only one MA plan at a time and that enrollment in this plan will automatically end my enrollment in another MA plan (exceptions apply for MA Private Fee-For-Service (PFFS), MA Medical Savings Account (MSA) plans).

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- MA-only plans: I understand that when my Aetna Medicare coverage begins, I must get all of my medical benefits from Aetna Medicare. MA-PD plans: I understand that when my Aetna Medicare coverage begins, I must get all of my medical and prescription drug benefits from Aetna Medicare. All plans: Benefits and services provided by Aetna Medicare and contained in my Aetna Medicare "Evidence of Coverage" document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor Aetna Medicare 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 under the laws of the State where I live) on this application means that I have read and understand the contents of this application. If signed by an authorized individual (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 from Medicare.

Aetna Medicare is a HMO, PPO plan with a Medicare contract. Our D-SNPs also have contracts with State Medicaid programs. Enrollment in our plans depends on contract renewal. Plan features and availability may vary by service area. Aetna® and CVS Pharmacy® are a part of the CVS Health® family of companies.

Signature		Today's date
If you're an <b>authorized representati</b> the enrollee, you must sign above an		<b>ower of attorney)</b> filling out this form on behalf of llowing information.
Name	Address	
Phone number ()	Relationship to	enrollee
For individuals h	elping an enroll	ee with completing this form
		nts, brokers, SHIP counselors, family members, rm (but not authorized to make decisions on
Name		Relationship to enrollee
Signature		National Producer Number (NPN) (Agents/Brokers only)

According to the Paperwork Reduction Act (PRA) 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 "How to enroll" on the first page of this form to send your completed form to the plan.



# **Aetna® Medicare Prequalification Assessment Tool**

# IMPORTANT: If you are enrolling in an Aetna Medicare Advantage Chronic Condition Special Needs Plan.

You are enrolling in an Aetna Medicare Advantage Chronic Condition Special Needs Plan (C-SNP). Our C-SNP plans are for people who have diabetes, congestive heart failure and certain cardiovascular diseases. To be a member, the Centers for Medicare & Medicaid Services (CMS) requires us to confirm with your physician that you have one of these conditions. **This is a two-step process.** 

- **Step 1:** Please fill out this form. Return it with your completed enrollment application. If you can check the box for at least one condition, you may qualify for an Aetna C-SNP plan.
- **Step 2:** We will confirm your qualifying condition within 30 days of your enrollment with your physician.

## Read the following statements carefully and check the box of the condition that applies to you.

By checking a box, you certify that, to the best of your knowledge, you have one of the covered chronic conditions to join this type of plan. If we later determine that this information is incorrect, you may be disenrolled. We will need the contact information of your primary care physician or specialist who can verify your condition.

# Section 1. Applicant's chronic condition diagnosis - at least one box below must be checked.

## Has a physician ever diagnosed you with one or more of the following conditions?

□ <b>Diabetes Mellitus</b> (high blood sugar)	□ Chronic Heart Failure (CHF) (enlarged heart and/or fluid on the lungs)	<ul> <li>□ Cardiovascular disease:</li> <li>□ Cardiac Arrhythmias (irregular heartbeat)</li> <li>□ Coronary Artery Disease (heart blockages)</li> <li>□ Peripheral Vascular Disease (poor circulation in your legs/feet and/or arms/hands)</li> <li>□ Chronic Venous Thromboembolic Disorder (blood clots in your legs or lungs)</li> </ul>	
$\Box$ I do not have any of these conditions.			

Completion of this form authorizes the disclosure of individually identifiable health information in accordance with federal laws concerning the privacy of such information.

By providing your signature below, you certify that you have been diagnosed with one or more of the chronic conditions necessary for enrollment in an Aetna Medicare Chronic Condition Special Needs Plan and authorize the physician listed below to confirm this diagnosis so that Aetna Medicare can confirm your C-SNP enrollment.

## Use and disclosure authorization Section 2. Applicant/authorized representative — please complete all fields.

Applicant name (required):	Date of birth (required):/
Medicare Number (required):	Telephone number (required):
Signature (required):	Today's date://

If you are an authorized representative helping someone to fill out this form, you must sign above and provide the following information.

Name:	Relationship to applicant:
Address:	Telephone number (required):

# Section 3. Please provide us the name of the physician(s) who can confirm your diagnosis below

Physician #1 who can verify your chronic condition (required)

Physician's name (required)				
Office telephone number (required):		Office fax number (optional):		
Address line 1				
Address line 2				
City	State		ZIP	
Office email address (if available):				

## Physician #2 who can verify your chronic condition (optional)

Physician's name (requ	uired)		
Office telephone number (required):		Office fax number (optional):	
Address line 1			
Address line 2			
City	State	ZIP	
Office email address (i	f available):		

## **AGENT USE ONLY**

## Agent/producer/broker/representative must complete this section

Applicant's name				
If you are the <u>agent/producer/broker/employed sales representative</u> , you must provide the following information and submit it with the completed application.				
□ Yes □ No	Was the Scope of Appointment (SOA) completed? (The SOA must be agreed to by the Medicare beneficiary prior to any personal individual marketing appointment.)  If "No," why not?:			
□ Yes □ No	Was the SOA captured electronically or by telephone?  If "Yes," please provide the confirmation/ID number:  ———————————————————————————————————			
Name of age	nt/producer/broker/sales rep:			
Phone numb	er:	National Producer Number (NPN):		
□ Check box	if application received at a retail l	kiosk.		
NOTE: If the agent/producer/broker/employed sales representative takes receipt of this application, a signature and date are <u>REQUIRED</u> below. Your signature indicates you understand that this application must be submitted within two calendar days of this date.				
Signature of agent/producer/broker/sales rep:		Date agent received the Individual Enrollment Request Form:		

Copy and keep this completed form for your records. The completed election period checklist on page 1 must be included with the form.

Fax or mail the completed form to:

Aetna Medicare PO Box 7405 London, KY 40742 Fax: 1-866-756-5514



## **Medicare Advantage Plan Enrollment Receipt**

### Agent/Broker: Complete and leave with enrollee.

Keep this as proof of your enrollment request until Medicare has confirmed your enrollment and you receive your member materials. This receipt is not a guarantee of enrollment.

This receipt is for your records only. No further action is necessary.

Applicant				
Name:				
Today's Date:	Proposed Effective Date:			
Call your Agent/Broker if you have any questions				
Agent/Broker Name:				
Agent/Broker Phone Number:	Agent/Broker ID:			

If you would like a complete copy of your enrollment form, call us at **1-800-562-6315 (TTY: 711)**, 8 AM to 8 PM, seven days a week, from October 1 to March 31 and 8 AM to 8 PM, Monday through Friday, from April 1 to September 30. Please allow at least 3 business days for us to process your application. **You'll need to provide your application tracking number, located at the bottom of this page.** 

Reminder - Your enrollment request is for a Medicare Advantage plan (Part C). These plans:

- Replace Original Medicare that's provided by the federal government
- Cover all your Part A and Part B benefits
- Don't supplement your Original Medicare coverage like Medicare Supplement or Medigap plans

Aetna Medicare is a HMO, PPO plan with a Medicare contract. Enrollment in our plans depends on contract renewal. Our D-SNPs also have contracts with State Medicaid programs. Plan features and availability may vary by service area. Aetna® and CVS Pharmacy® are a part of the CVS Health® family of companies.

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