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2023

Enrollment Book

HealthTeam Advantage Plan I (PPO)

HealthTeam Advantage Plan II (PPO)

HealthTeam Advantage Diabetes & Heart Care (HMO CSNP)

Individual Enrollment Application Form 2023 Plan Year

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 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?

Send your completed and signed form to:

HealthTeam Advantage
7800 McCloud Road, Suite 100
Greensboro, NC 27409

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

How do I get help with this form?

Call HealthTeam Advantage at 877-905-9216. 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 HealthTeam Advantage al 877-905-9216/TTY 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.

Individual Enrollment Application Form 2023 Plan Year

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Section 1 – All fields on this page are required (unless marked optional)

Select the plan you want to join:

- ☐ HealthTeam Advantage Plan I PPO $0 per month
- ☐ HealthTeam Advantage Plan II PPO $75 per month
- ☐ HealthTeam Advantage Diabetes & Heart Care HMO CSNP $0 per month

FIRST Name:	LAST Name:	[Optional: Middle Initial]:

Birth Date: (_____/_____/_____) (MM/DD/YYYY)	Sex: ☐ Male ☐ Female	Phone Number: ( )

Permanent Residence Street Address (Don't enter a PO Box):

City:	[Optional: County]:	State:	ZIP Code:

Mailing address, if different from your permanent address (PO 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 HealthTeam Advantage? ☐ Yes ☐ No

Name of other coverage: _____ Member number for this coverage: _____ Group number for this coverage _____

If you are signing up for the HMO CSNP plan, please complete the **Chronic Condition Verification Form on page 17.**

IMPORTANT: Read and sign below:

- I must keep both Hospital (Part A) and Medical (Part B) to stay in HealthTeam Advantage.
- By joining this Medicare Advantage, I acknowledge that HealthTeam Advantage 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 plan at a time – and that enrollment in this plan will automatically end my enrollment in another MA plan (exceptions apply for MA PFFS, MA MSA plans).
- I understand that when my HealthTeam Advantage coverage begins, I must get all of my medical and prescription drug benefits from HealthTeam Advantage. Benefits and services provided by HealthTeam Advantage and contained in my HealthTeam Advantage "Evidence of Coverage" document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor HealthTeam Advantage 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:** _____

If you're the authorized representative, sign above and fill out these fields:

Name: _____ Address: _____

Phone number: _____ Relationship to enrollee: _____

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Section 2 – All fields on this page are optional

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 Spanish origin
- ☐ Yes, Mexican, Mexican American, Chicano/a
- ☐ Yes, Puerto Rican
- ☐ Yes, Cuban
- ☐ Yes, another Hispanic, Latino/a, or Spanish origin
- ☐ **I choose not to answer.**

What's your race? Select all that apply.

- ☐ American Indian or Alaska Native
- ☐ Asian Indian
- ☐ Black or African American
- ☐ Chinese
- ☐ Filipino
- ☐ Guamanian or Chamorro
- ☐ Japanese
- ☐ Korean
- ☐ Native Hawaiian
- ☐ Other Asian
- ☐ Other Pacific Islander
- ☐ Samoan
- ☐ Vietnamese
- ☐ White
- ☐ **I choose not to answer.**

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

- ☐ Spanish

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

- ☐ Braille
- ☐ Large print
- ☐ Audio CD

Please contact HealthTeam Advantage at 888-965-1965 (TTY 711) if you need information in an accessible format other than what's listed above. Our office hours are October 1-March 31, 8 a.m. to 8 p.m. ET, seven days a week, or April 1-September 30, 8 a.m. to 8 p.m. ET, Monday through Friday. TTY users can call 711.

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

List your Primary Care Physician (PCP), clinic, or health center: _____

I want to get the following materials via email.

- ☐ Information Booklet

E-mail address: _____

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Paying Your Plan Premiums

You can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail, Electronic Funds Transfer (EFT), or credit card each month. **You can also choose to pay your premium by having it automatically taken out of your Social Security or Railroad Retirement Board (RRB) benefit each month.**

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.

Please select a premium payment option:

☐ Get a bill monthly

☐ Electronic funds transfer (EFT) from your bank account each month.
Please enclose a VOIDED check or provide the following:

Account Holder Name: _____

Bank Routing Number: _____

Bank Account Number: _____

Account type: ☐ Checking ☐ Savings

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

Office Use Only:

_____
Name of agent/broker (if assisted in enrollment) NPN

_____
Plan ID# Effective Date of Coverage

Date Application Received by Agent: _____

ICEP/IEP: _____ AEP: _____ OEP: _____ SEP (type): _____ Not Eligible: _____

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 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.

Scope of Sales

Appointment Confirmation Form

The Centers for Medicare & Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or their authorized representative.

Please initial below beside the type of product(s) you want the agent to discuss.

	MEDICARE ADVANTAGE PLANS (PART C)

Medicare Preferred Provider Organization (PPO) Plan—A Medicare Advantage Plan provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals but you can also use out-of-network providers, usually at a higher cost.

	MEDICARE ADVANTAGE PLANS (PART C)

Medicare Health Maintenance Organization (HMO) Plan—A Medicare Advantage Plan provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. HMOs have network doctors and hospitals from which you must get your care and services.

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the product(s) is either employed or contracted by a Medicare plan. They do not work directly for the federal government. This individual may also be paid based on your enrollment in a plan.

Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

Beneficiary or Authorized Representative Signature and Signature Date:

Signature: _____ Date: _____

If you are the representative, please sign above and print below:

Representative's Name: _____

Your Relationship to the Beneficiary: _____

Scope of Sales, continued

To be completed by Agent:

Plan(s) the agent represented during this meeting: _____

Agent Name: _____ Agent Phone: _____

Beneficiary Name: _____ Beneficiary Phone: _____

Beneficiary Address: _____
(optional)

Initial Method of Contact: (Indicate here if beneficiary was a walk-in.)

☐ Agent book of business ☐ Beneficiary referral ☐ Walk-in

☐ Agent contact ☐ Agent referral

Date Appointment Completed: _____

*Scope of Appointment documentation is subject to CMS record retention requirements.

Agents return this form to:

HealthTeam Advantage, 7800 McCloud Rd., Suite 100, Greensboro, NC 27409, or by fax 866-790-4173

Attestation of Eligibility for an Enrollment Period

Individual Enrollment Application Form

Typically, you may enroll in a Medicare Advantage plan only 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.

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) _____.

Attestation of Eligibility for an Enrollment Period, continued

Individual Enrollment Application Form

- ☐ 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 qualification required to be in that plan. I was disenrolled from the SNP on (insert date) _____.
- ☐ I was affected by a weather-related emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA). One of the other statements here applied to me, but I was unable to make my enrollment because of the natural disaster.
- ☐ There is a 5-Star Medicare Advantage plan in my area.

If none of these statements apply to you or you're not sure, please contact HealthTeam Advantage at 877-905-9216 (TTY 711) to see if you are eligible to enroll. We are open October 1-March 31, 8 a.m. to 8 p.m. ET, seven days a week, or April 1-September 30, 8 a.m. to 8 p.m. ET, Monday through Friday.

This document is required for HMO CSNP applicants.

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Chronic Condition Verification Form

Completion of this document authorizes the disclosure and/or use of individually identifiable health information, as set forth below, consistent with federal law concerning the privacy of such information.

Release of Information

By joining HealthTeam Advantage (HTA), a Medicare Advantage Special Needs Plan for Chronic Conditions, I acknowledge that I have one or more of the following conditions:

☐ **Diabetes** ☐ **Chronic Heart Failure**

I authorize and direct _____ (Care Provider/ Specialist) to confirm my chronic condition and disclose my medical records to HTA. This authorization shall be effective until I am no longer enrolled in HTA.

Application Use and Disclosure Authorization

APPLICANT, please complete if applicable.

Print Name of Applicant/Authorized Representative: _____

Medicare ID Number or Date of Birth: _____

Signature of Applicant/Authorized Representative: _____ Date: _____

If you are the authorized representative of the applicant, provide the following information:

Relationship to Applicant: _____ Phone Number: _____

Provider Confirmation of Chronic Condition

PROVIDER, please complete.

I, _____ (Provider)

hereby certify that _____ (Applicant)

has the following health condition(s):

☐ **Diabetes** ☐ **Chronic Heart Failure**

Provider: _____ **Date:** _____

Provider Address: _____

_____ **Provider Phone:** _____

Fax this completed form to: 866-790-4173

Mail this form to: HealthTeam Advantage, 7800 McCloud Road, Suite 100, Greensboro, NC 27409
If you have any questions, please call: 877-905-9216, TTY 711, Monday—Friday, 8:00 a.m.—5:00 p.m.

Application Checklist

Here's a quick checklist to review your application and to keep for your records.

_____ 1. The agent reviewed the HealthTeam Advantage Summary of Benefits for all HealthTeam Advantage plans.

_____ 2. I selected the HealthTeam Advantage plan that best fits my current Medicare needs.

_____ 3. I understand that the plan I have chosen is NOT a Medicare supplement (Medigap) plan.

_____ 4. The agent explained the assistance a HealthTeam Advantage Healthcare Concierge can provide.

_____ 5. The agent reviewed prescription drug (Rx) needs and identified the tiers and related co-pays using the Drug List. The agent explained the Rx benchmark, 2023 coverage gap, new changes once the coverage gap is reached, step therapy (if required), late enrollment penalty, and prior authorization.

_____ 6. The agent explained I must continue to pay the Medicare Part B premium.

_____ 7. The agent gave me the following materials:
A. HealthTeam Advantage Summary of Benefits
B. Multi-Language Insert
C. Business Card

_____ 8. I understand that the Primary Care Provider I have chosen is
_____
and the physician is currently ☐ In-network ☐ Out-of-network
**Network participation may change*

_____ 9. The payment method I have selected is ☐ Monthly Invoice ☐ SSA Deduct ☐ ACH

_____10. I understand that I need to complete the Health Risk Assessment (HRA).

_____ 11. I understand that I must complete the Chronic Condition Verification form if I have signed up for the HMO CSNP plan.

Receipt

This receipt verifies that you completed an enrollment form with an agent who sells HealthTeam Advantage Medicare Advantage health plans.

Important Enrollment Information

Application Date: _____

Proposed Effective Date: _____

Medicare ID: _____

Plan Name: _____

Sales Agent Name: _____

Sales Agent Phone: _____

Sales Agent ID: _____

Thank You for Enrolling in HealthTeam Advantage!

What's Next?

The following next steps will help you better understand what to expect on your way to becoming a HealthTeam Advantage Member.

The day you enroll...

- Receipt of completed enrollment form: The agent will provide a receipt that confirms you submitted an enrollment form. If you enroll online, you will receive a confirmation number and you will have the ability to print an electronic copy of your completed application for your files.

Within 10 days of submitting enrollment form...

- Letter confirming receipt of your enrollment and enrollment approval from Medicare to the HealthTeam Advantage plan you selected.

When you become a HealthTeam Advantage member...

- **HealthTeam Advantage Welcome Kit:** Your Welcome Kit will include your Evidence of Coverage (EOC) booklet which provides detailed coverage information.
- **HealthTeam Advantage member identification cards:** You will receive a HealthTeam Advantage member identification card.
- **Personal Healthcare Concierge at your service:** If you would like assistance finding a provider, scheduling an appointment, have questions about your benefits, or need a replacement identification card, simply email your concierge at conciergehta@htanc.com, or call 888-965-1965 (TTY 711) October 1-March 31, 8 a.m. to 8 p.m. ET, seven days a week, or April 1-September 30, 8 a.m. to 8 p.m. ET, Monday through Friday.

CONTACT INFORMATION

Online
Visit **HealthTeamAdvantage.com**.

Address
7800 McCloud Road, Suite 100
Greensboro, North Carolina, 27409

Sales
Prospective members call toll-free 877-905-9216 for questions related to our Medicare Advantage Plans.

October 1-March 31, 8 a.m. to 8 p.m. ET, seven days a week.
April 1-September 30, 8 a.m. to 8 p.m. ET, Monday through Friday.

TTY Users
TTY users call toll-free 711 for questions related to our Medicare Advantage Plans.

Prescription Drug Benefit
Prospective members call toll-free 877-905-9216 for questions related to our Part D Prescription Drug Benefit.

Medicare
For more information about Medicare, call 1-800-MEDICARE (1-800-633-4227), 24 hours a day, seven days a week. TTY users should call 1-877-486-2048. Or, visit Medicare.gov.

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