

# MEDICARE ADVANTAGE & MEDICARE ADVANTAGE PRESCRIPTION DRUG PLAN ENROLLMENT FORM

## 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?

Send your completed and signed form to:  
CCA Health California  
2 Avenue De Lafayette, 5th Floor  
Boston, MA 02111  
Or Fax to 1-866-207-6650

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

## How do I get help with this form?

Call CCA Health California at 833-386-3552. 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 CCA Health California al 833-386-3552/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.

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 on this page are required (unless marked optional)**

**Select the plan you want to join:**  
 CCA Medicare Excel (HMO) Santa Clara County- \$0 per month  
 CCA Medicare Excel (HMO) San Joaquin, Stanislaus and Merced Counties - \$0 per month

FIRST name: \_\_\_\_\_ LAST name: \_\_\_\_\_ Middle Initial (optional): \_\_\_\_\_

Birth date: (MM/DD/YYYY) ( ____ / ____ / ____ )	Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female	Phone number: ( ____ ) _____
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Permanent Residence street address (Don't enter a PO Box): \_\_\_\_\_

City: _____	County (optional): _____	State: _____	ZIP Code: _____
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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 this plan?  Yes  No  
 Name of other coverage: \_\_\_\_\_ Member number for this coverage: \_\_\_\_\_ Group number for this coverage: \_\_\_\_\_

**IMPORTANT: Read and sign below:**

- I must keep both Hospital (Part A) and Medical (Part B) to stay in CCA Health California Medicare Advantage Plans.
- By joining this Medicare Advantage, I acknowledge that CCA Health California 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 CCA Health California coverage begins, I must get all of my medical and prescription drug benefits from CCA Health California. Benefits and services provided by CCA Health California and contained in my CCA Health California “Evidence of Coverage” document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor CCA Health California 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.

<b>Signature:</b> _____	<b>Today's date:</b> _____
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If you're the authorized representative, sign above and fill out these fields:

Name: _____	Address: _____
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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 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       Black or African American  
Asian      Native Hawaiian and Pacific Islander:  
 Asian Indian       Guamanian or Chamorro  
 Chinese       Native Hawaiian  
 Filipino       Samoan  
 Japanese       Other Pacific Islander  
 Korean       White  
 Vietnamese       **I choose not to answer.**  
 Other Asian

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

- Spanish    Chinese    Korean    Vietnamese

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

- Braille    Large print    Audio CD

Please contact CCA Health California at 833-386-3552 if you need information in an accessible format other than what's listed above. Our office hours are 7 days a week, 8 am - 8 pm. 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:

**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 or Electronic Funds Transfer (EFT) each month. You can also choose to pay your premium by automatic deduction from your Social Security or Railroad Retirement Board (RRB) benefit check each month. If you pay a Part D-Income Related Monthly Adjustment Amount, you will be notified by the Social Security Administration. You will be responsible for paying this extra amount in addition to your plan premium. You will either have the amount withheld from your Social Security benefit check or be billed directly by Medicare or RRB. DO NOT pay CCA the Part D-IRMAA.

**Would you like the premium for this plan deducted from your SSA or RRB monthly benefit check?**

- Yes, Automatically deduct from my Social Security or Railroad Retirement Board (RRB) benefit check.

I get my benefits from:    Social Security    Railroad Retirement Board

**Staff member/Agent/Broker use only:**

Name (if assisted in enrollment): \_\_\_\_\_ NPN#: \_\_\_\_\_

Initial receipt date: \_\_\_\_\_ Proposed effective date of coverage: \_\_\_\_\_

**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.

**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.

- Annual Enrollment Period (AEP). Your plan effective date will be January 1.
- 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 \_\_\_/\_\_\_/\_\_\_.
- I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on \_\_\_/\_\_\_/\_\_\_.
- I am leaving employer or union coverage on \_\_\_/\_\_\_/\_\_\_.
- 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 \_\_\_/\_\_\_/\_\_\_.
- 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 \_\_\_/\_\_\_/\_\_\_.
- 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.

If none of these statements applies to you or you're not sure, please contact CCA Health California at 833-386-3552 (TTY users should call 711) to see if you are eligible to enroll. We are open 7 days a week, 8 am - 8 pm.