

Benefits Enrollment / Change Form for PAT Early Retirees

For HR/Benefits use only
Coverage effective date _____
MONTH / DAY / YEAR
 DP SP

Reason for Enrollment

Open Enrollment Change in Status*

Date of Change _____ Reason _____

Enrolled in public healthcare exchange effective _____, 20_____.

*Change in status is allowed for qualifying life events, which include but are not limited to:

- Marriage
- Divorce or legal separation
- Birth, adoption or legal guardianship
- Death
- Gain or loss of other coverage

You will be asked to provide documentation for these events. Find details at <http://sdtrust.com/benefits-whatif.html>.

Early Retiree Information (All fields are required)

LAST NAME	FIRST	INITIAL	SOCIAL SECURITY NO.
HOME ADDRESS			EMPLOYEE ID NO.
CITY, STATE, ZIP			E-MAIL ADDRESS
HOME PHONE	DATE OF BIRTH	MARITAL STATUS <input type="checkbox"/> SINGLE <input type="checkbox"/> MARRIED <input type="checkbox"/> DIVORCED	GENDER <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE

Medical, Dental and Vision Plans You must choose one.

Early Retiree Medical Plans	GROUP #	GROUP #
<input type="checkbox"/> Early Retiree Medical Plan 2 (administered by Regence)	10013296	<input type="checkbox"/> Early Retiree Kaiser 1740-001
<input type="checkbox"/> Closed to new enrollees Early Retiree Trust Indemnity Medical Plan 1 (administered by Regence)	10013296	<input type="checkbox"/> Early Retiree Providence Personal Option R004

Trust Dental/Vision Plans (You must be enrolled in medical coverage unless you defer or suspend Trust coverage because you have other group medical coverage.)

Basic Trust Dental/Vision (Kaiser participants will only receive Trust dental coverage, vision is included with Kaiser medical)

Buy-Up Trust Dental/Vision (Kaiser participants will only receive Trust dental coverage, vision is included with Kaiser medical)

Dependent Information If you are adding or dropping a dependent, complete the following section. (Dependent eligibility will be verified upon Plan enrollment.)

Spouse/Domestic Partner

ACTION	LAST NAME	FIRST	INITIAL	SOCIAL SECURITY NO. (REQUIRED)*	DATE OF BIRTH	GENDER	RELATIONSHIP
<input type="checkbox"/> ADD <input type="checkbox"/> DROP						<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE	<input type="checkbox"/> SPOUSE <input type="checkbox"/> DOMESTIC PARTNER

Children – If you need to enroll additional dependents please fill out and attach a second, signed enrollment form that lists them.

ACTION	LAST NAME	FIRST	INITIAL	SOCIAL SECURITY NO. (REQUIRED)*	GENDER	BIRTHDATE MM/DD/YY	RELATIONSHIP: NATURAL/ADOPTED/STEPCHILD	EMPLOYEE RESPONSIBLE FOR SUPPORT?	INCAPACITATED CHILD?
<input type="checkbox"/> ADD <input type="checkbox"/> DROP					<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE			<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/> ADD <input type="checkbox"/> DROP					<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE			<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/> ADD <input type="checkbox"/> DROP					<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE			<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO

* Dependents will not be added if a social security number is not provided for that dependent.

You must inform the Trust if a dependent spouse, domestic partner or child is no longer eligible to receive benefits from the Trust. Please be aware if an individual who has been reported as your dependent receives benefits after Trust eligibility has ended, the Trust may recover the improperly-paid benefits from you.

If you or your spouse or domestic partner is eligible for Medicare, you are not eligible for Early Retiree benefits coverage through the Trust. You are required to notify the Trust if you become eligible for Medicare prior to age 65.

Other Coverage

If you, your spouse/domestic partner or other dependents are covered by District coverage or by any other health care insurance, complete the following section:

Is your spouse/domestic partner also an employee of the School District?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you or any family member(s) covered by:	<input type="checkbox"/> Medicare <input type="checkbox"/> Other coverage If yes, check the types of coverage <input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision Complete the "Family Members With Other Coverage" section below.

Early Retiree Information

LAST NAME	FIRST	INITIAL	EMPLOYEE ID NO.
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Child Custody Information

If you or your spouse are divorced or legally separated, please indicate who has custody of your dependent child(ren)?	<input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Other
Has the parent without custody been mandated by court decree to provide coverage for the dependent child(ren)?	<input type="checkbox"/> Yes If yes, complete the "Family Members With Other Coverage" section below. <input type="checkbox"/> No

Family Members With Other Coverage

To be completed only if you, or a dependent you are enrolling through the Trust, has other insurance.

NAME OF FAMILY MEMBER WITH OTHER COVERAGE	DATE OF BIRTH	NAME OF OTHER INSURANCE PLAN
NAME OF EMPLOYEE	GROUP ID NUMBER	EFFECTIVE DATE OF OTHER COVERAGE
CLAIMS ADDRESS		

Medicare Eligibility

Completion of this information is required.

Name	Enrolled in Medicare? (If Yes, provide a copy of your Medicare card with this form)		Check Box if Applicable	Date Dialysis Began or Date of Transplant (MM/DD/YY)
	Part A	Part B		
SELF	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Dialysis <input type="checkbox"/> Kidney Transplant	
SPOUSE/DOMESTIC PARTNER	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Dialysis <input type="checkbox"/> Kidney Transplant	
DEPENDENT	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Dialysis <input type="checkbox"/> Kidney Transplant	
DEPENDENT	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Dialysis <input type="checkbox"/> Kidney Transplant	
DEPENDENT	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Dialysis <input type="checkbox"/> Kidney Transplant	

Signature

My signature below indicates that I have read and understand this enrollment form and descriptive materials provided. This enrollment form is binding on me and cannot be revoked or modified except as explained in the descriptive materials provided. I authorize my insurance carriers to obtain, examine, or release any medical or dental records or other information needed to coordinate benefits or process claims for me and my family members. I also authorize any provider having knowledge of my medical history or my dependents to release to my insurance carriers any medical information it requests. I authorize my insurance carriers to share such medical information with me or my dependents' health care providers. I declare that the dependents listed on this form are my eligible dependents and will be subject to verification of eligibility. I also declare that the information furnished on this form is correct and complete to the best of my knowledge.

SIGNATURE VERIFYING I'VE READ AND UNDERSTAND MATERIAL	DATE
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Return completed form to:
Trust Office, 700 NE Multnomah St., Suite 350, Portland, OR 97232
Phone: 1-503-238-6961 or 1-844-203-0239 (toll free), Option #2
Fax: 1-503-238-0205