

# Enrollment/Change Form

TO BE COMPLETED BY EMPLOYER

Please print or type in black ink only.  
See instructions on reverse before completing this form.  
Make a copy for your records.

Company name (required) \_\_\_\_\_ Date of hire (required) \_\_\_\_\_

Group number (required) \_\_\_\_\_ Enrollment unit (required) \_\_\_\_\_ Effective date of coverage (required) \_\_\_\_\_

## NEW ENROLLMENT *Check one only:*

- New purchaser  Part-time or full-time  Open enrollment (complete sections A, B, C, D)  
 New hire (complete sections A, B, C, D)  Other (please specify): \_\_\_\_\_  
 Loss of other coverage (complete sections A, B, C, D) Event date: \_\_\_\_\_

## IF MAKING A CHANGE, COMPLETE THE FOLLOWING:

- Add dependents (complete sections A, B, D)  Delete dependents (complete sections A, B, D)

\*Reason: \_\_\_\_\_ (see Change Reason Table) Event date: \_\_\_\_\_

Name change (complete sections A, B, D) From: \_\_\_\_\_ To: \_\_\_\_\_

Address (complete section A, D): \_\_\_\_\_

Telephone (complete section A, D): \_\_\_\_\_

## A. EMPLOYEE INFORMATION

Are you now or have you ever been a Kaiser Permanente member?  Yes  No

If so, what is/was your medical record number (if known)? \_\_\_\_\_

Name (Last, First, MI) \_\_\_\_\_ Former name/maiden \_\_\_\_\_

Home address \_\_\_\_\_ Apt. no. \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home phone \_\_\_\_\_ Work phone \_\_\_\_\_ Social Security number \_\_\_\_\_

Date of birth \_\_\_\_\_ E-mail \_\_\_\_\_

Gender  M  F Preferred spoken or written language (optional) \_\_\_\_\_ Ethnicity (optional) \_\_\_\_\_

## B. FAMILY INFORMATION For additional dependents, attach a separate sheet and please put the employee's name at the top. (Last, First, MI)

Add  Delete  Spouse  Domestic partner

Spouse/Domestic partner name: \_\_\_\_\_

Former last name (if any): \_\_\_\_\_

Add  Delete  Child  Student

Dependent name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Add  Delete  Child  Student

Dependent name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Do any of your dependents above live at another address?  Yes  No If yes, complete the following:

Name(s) (Last, First, MI): \_\_\_\_\_ Address: \_\_\_\_\_

## C. OTHER COVERAGE INFORMATION:

Including yourself, do any of the persons listed above have other coverage?  Yes  No

Name \_\_\_\_\_ Insurance carrier name \_\_\_\_\_ Policy number/Effective date \_\_\_\_\_ Phone number \_\_\_\_\_

**D. Kaiser Foundation Health Plan Arbitration Agreement: I understand that (except for Small Claims Court cases, claims subject to a Medicare appeals procedure and, if my Group must comply with Employee Retirement Income Security Act regarding certain benefit related disputes) any dispute between myself, my heirs, or other associated parties on the one hand and Health Plan, its health care providers, or other associated parties on the other hand, for alleged violation of any duty arising out of or related to membership in Health Plan, including any claim for medical or hospital malpractice, for premises liability or relating to the coverage for, or delivery of, services or items, irrespective of legal theory, must be decided by binding arbitration under California law and not by lawsuit or resort to court process, except as applicable law provides for judicial review of arbitration proceedings. I agree to give up my right to a jury trial and accept the use of binding arbitration. I understand that the full Arbitration provision is contained in the Evidence of Coverage.**

Employee/Applicant signature \_\_\_\_\_ Date \_\_\_\_\_

\*Additional documentation may be required.



# Enrollment Form

## General instructions:

1. Please print legibly in black ink.
2. To be enrolled, you must live or work within one of the ZIP codes listed in the Enrollment section of this booklet.
3. The employer must complete the first section labeled *To be completed by employer*.
4. The employer is responsible for confirming all information prior to submitting, especially effective dates as these affect your Health Plan dues.
5. The employee/subscriber must complete Sections A through D. See right column for detailed instructions.
6. Check the box for the option selected at the top of the Enrollment Form.
7. Be sure to sign and date the bottom of the form.
8. Once the form is complete (including completed employer section), the subscriber should make a copy for his/her records to use with the Temporary Membership ID, after the effective date.
9. All changes to accounts, including effective dates and child or student status, will be made in accordance with the contractual agreement between the purchaser and Kaiser Permanente.

## Instructions for completing employer and new enrollment sections and sections A through D:

**To be completed by employer:** The employer must complete all fields to ensure we have correct account and enrollment reason information. The employer is responsible for confirming all information submitted by the subscriber, especially effective dates as they affect the Health Plan dues.

**If making a change:** The subscriber must always complete this section, even when making minor changes to the account. This ensures our information is current. Please mark the box if your address is new.

**Section A:** The subscriber must complete this section.

**Section B:** The subscriber must indicate the requested change being made to the account and complete all fields for any dependents being enrolled. We will verify the eligibility of these dependents during the enrollment process. Be sure to include any former last names for both spouses and dependents. Also indicate the appropriate role. The student role should only be marked if the dependent qualifies as an *overage dependent* attending school. Please contact your employer regarding the employer's rules for overage dependent students. A completed Student Certification form may be required.

**Sections C, D:** The subscriber must complete these sections.

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## Change Reason Table

Add dependent reason	Event date
Acquired student status*	Date student status was obtained
Family adoption*	Date of adoption
Loss of coverage	Date coverage was lost
New spouse (marriage)*	Date of marriage
Moved into service area	Move date
Newborn addition	Date of birth
Open enrollment	Open enrollment effective date
Delete dependent reason	Event date
Loss of student status	Date of status change
Divorce	Date of divorce
Member deceased*	Date of death
Delete dependent(s)	Dependent termination date
Open enrollment	Open enrollment effective date

\*Additional documentation may be required.