

## EC-2 Enrollment Form Instructions

### Enrollment Type

Select the event for which you are submitting the enrollment form. Mark the Retirement box if you're newly retired, Qualifying Event box if you are making changes outside of the Open Enrollment period, or the Open Enrollment box during the annual or limited open enrollment period. If submitting the enrollment form for a qualifying event, give a brief description of the event and input the date the qualifying event occurred.

#### I. Retiree Data

Complete all information about yourself and your spouse/partner.

#### II. Coverage Start Date

This section only needs to be completed if filing for adoption/placement for adoption, birth, marriage, domestic partner, guardianship or new eligible student, and you pay towards health plan benefits. Select one of the three choices for when your coverage and premium contributions will begin. If no selection is made, the first option will be the default option used.

#### III. Plan Selection

Mark all plans you wish to be enrolled in. You may only enroll in ONE medical plan. If you select Kaiser, your medical selection will include Kaiser Prescription drug coverage. If you select HMSA and wish to enroll in prescription drug coverage, you must select the CVS Caremark prescription drug plan (if you do not make a selection you will not have any prescription drug coverage). If you wish to dis-enroll from plans, mark the "Cancel/Waive" box. If no selection is made, EUTF will assume no changes are being made.

#### IV. Dependent Information

Complete dependent information and indicate plan selection if adding or removing dependents. If you are adding/removing more than three dependents and additional rows are needed, please attach another sheet to your enrollment form. Required supporting documents (i.e., court order, birth certificate, etc.) must be submitted to the EUTF within 60 days of the event date. Please review the section on required supporting documents, which may be found in the Retiree Reference Guide on pages 92-93, or online at [eutf.hawaii.gov](http://eutf.hawaii.gov).

**Reminder:** Please submit student certification for dependent children ages 19 through 23 who are unmarried and a full-time student.

#### V. Medicare

If you and/or your dependent(s) are eligible to enroll in Medicare Part B, complete the name and Medicare Claim Number of the individuals enrolled. Additionally, you must submit proof of Medicare Part B enrollment to the EUTF in order to be enrolled in EUTF retiree medical and/or prescription drug coverage. Submit a copy of your Medicare card (indicating enrollment in Medicare Part B), letter from the Social Security Administration indicating your Medicare Part B premium, and EUTF Direct Deposit Agreement form. Failure to comply may result in loss of EUTF medical and/or prescription drug coverage.

#### VI. Other Insurance Information

If you or your dependents are covered under another health plan, you are required to complete this section. The information that you provide does not determine how your benefits are coordinated. Coordination of Benefits rules are determined by the health benefit plans and follow the guidelines of the National Association of Insurance Commissioner ([www.naic.org](http://www.naic.org)).

#### VII. Retiree Signature

Read, sign and date the form.

Submit your EC-2 form to the EUTF office. Please see addresses printed on the bottom of page 2 of the enrollment form. To ensure proper processing, all required fields must be completed and proper documentation submitted timely.



# EC-2 RETIREE HEALTH BENEFITS ENROLLMENT FORM

*Complete each section thoroughly, please print clearly*

Enrollment Type ( <i>check one</i> ):	Retirement <input type="checkbox"/>	Qualifying Event <input type="checkbox"/>	Open Enrollment <input type="checkbox"/>
Retirement or Qualifying Event Date: _____		Qualifying Event Description: _____	

## I. RETIREE DATA

Full Name: \_\_\_\_\_ Social Security No.: \_\_\_\_\_  
Last First M.I.

Mailing Address: \_\_\_\_\_ Residence Address: \_\_\_\_\_  
City State Zip Code City State Zip Code

Marital Status:  Single  Married  Domestic Partner      Gender:  Male  Female      Birthdate: \_\_\_\_\_  
 Marriage Date: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Spouse/Partner Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Birthdate: \_\_\_\_\_

## II. COVERAGE START DATE

*Complete this section if filing for adoption/placement for adoption, birth, marriage, domestic partner, guardianship, or newly eligible student.*

- Coverage starts day of the event & premium contributions start 1<sup>st</sup> day of the pay period in which the effective date of coverage occurs. **(If no selection is made, this option will be used.)**
- Coverage and premium contributions start 1<sup>st</sup> day of the first pay period following event (1<sup>st</sup> or the 16<sup>th</sup> of the month)
- Coverage and premium contributions start 1<sup>st</sup> day of the second pay period following event (1<sup>st</sup> or the 16<sup>th</sup> of the month)

## III. PLAN SELECTION

*Make your selection by checking all the boxes of the appropriate benefit plans below. Choose only one box in each type category.*

Type	Carrier Selection	Cancel/waive	Self	2-Party	Family
<b>Medical:</b> <small>Choose <u>ONE</u></small>	HMSA PPO-90/10 Medical <small>(No Prescription Drug Coverage)</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Kaiser HMO Medical <small>(Includes Kaiser Prescription Drug)</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Prescription Drug:</b>	CVS Caremark Prescription Drug <small>(Not a valid selection with Kaiser)</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Dental:</b>	Hawaii Dental Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Vision:</b>	Vision Service Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Life:</b>	USAbLe Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<b>Not available to dependents</b>	

Retiree's Name:

State and County Contributions: No person may be enrolled in any EUTF benefit plan as both a retiree/active employee and dependent, nor may children be enrolled by more than one retiree/active employee (dual enrollment). In addition, if you and your spouse/partner are both retirees/active employees, the employer's contribution cannot exceed a family plan contribution in accordance with Chapter 87A-33-36, Hawaii Revised Statutes. Both retirees/active employees are able to select EUTF Self-only plans, but not Self-only and 2 Party plans or Self-only and Family plans.

IV. DEPENDENT INFORMATION

Complete dependent information and indicate plan selection if adding/removing dependents

Table with columns: Continue, Add, Delete, Last Name, First, Middle Initial, Birthdate, SSN, Relationship, Gender, Medical, Drug, Dental, Vision. It contains three rows of checkboxes for dependent information.

If dependents are ages 19 to 23 please submit certification from the school registrar or national clearinghouse indicating they are a full-time student. Detailed eligibility information is available online at/eutf.hawaii.gov

V. MEDICARE

Are you and/or any of your dependents eligible for Medicare Part B? [ ] Yes (Complete section below) [ ] No

Table with two columns: Name, Medicare Claim Number. It has two rows for dependent information.

State law requires that retirees and their covered dependents enroll in Medicare Part B when they become eligible in order to be enrolled in EUTF/HSTA VB retiree medical and/or prescription drug coverage, HRS Chapter 87A-23(4). Please submit a copy of your Medicare card.

VI. OTHER INSURANCE INFORMATION

If you or any of your dependents are covered under another non EUTF health plan(s), provide data below.

Table with columns: Type of Plan: (i.e. medical, dental), Name of the Plan: (i.e. HMSA, Quest), Subscribers Name(s). It has two rows for insurance information.

VII. RETIREE SIGNATURE

I am eligible for the coverage requested and declare that the individuals listed on this enrollment form are also eligible. I understand that the benefit elections made on this application are in effect as long as I continue to meet EUTF's eligibility requirements, or until I elect to change them subject to the provisions of EUTF's plan rules. I have read the benefit materials, understand the limitations and qualifications of the EUTF benefits program and agree to abide by the terms and conditions of the benefit plans elected.

A person who knowingly makes a false statement in connection with an application for any benefit may be subject to imprisonment and fines. Additionally, knowingly making a false statement may subject a person to termination of enrollment, denial of future enrollment, or civil damages. EUTF retains the right to terminate coverage in the event of non-payment, if payment is applicable. This form supersedes all forms and submissions previously made for EUTF coverage. I hereby declare that the above statements are true to the best of my knowledge and belief, and I understand that I am subject to penalties for perjury.

Retiree Signature

Date

Please submit your completed EC-2 form to:

EUTF
201 Merchant Street, Suite 1700
Honolulu, HI 96813

Customer Service Call Center

Oahu (808) 586-7390
Toll Free 1(800) 295-0089