HR-0916-0519

State Health Benefits Program (SHBP) ● School Employees' Health Benefits Program (SEHBP)

RETIREE HEALTH BENEFITS ENROLLMENT and/or CHANGE FORM

HIGH DEDUCTIBLE NON-MEDICARE ENROLLEES

1. MEMBER INFORMATION — Last Name | First | MI

Gender	Birth Date	Social Security Number	Marital Status*
	/ /	— —	

Telephone Number: ( )

Personal Email Address:

Street Address | *City* | *State* | *Zip*

2. REASON FOR APPLICATION *(check one)*

- ☐ New Retiree
- ☐ Medical Plan Change
- ☐ Enrolling in Medical *(Previously Waived)*
- ☐ Adding Dependents
- ☐ Deleting Dependents
- ☐ Survivor Enrollment
  Decedents SS#_____
  Date of Event _____/_____/_____

3. DATE OF RETIREMENT _____/_____/_____

3a. FORMER EMPLOYER NAME

_____

3b. Were you a part-time employee when you retired? ☐ Yes ☐ No

4. LEVEL of COVERAGE

- ☐ Single
- ☐ Parent/Child
- ☐ Member/Spouse/Civil Union
- ☐ Member/Domestic Partner
- ☐ Family

5. HEALTH PLAN *(check one box only)*

HORIZON	AETNA
☐ NJ DIRECT HD4000	☐ Aetna Value HD4000

Note: Medicare-eligible retirees cannot enroll in a High Deductible Health Plan.

6. HEALTH SAVINGS ACCOUNT (HSA)

☐ I wish to establish a HSA at this time and understand that I will be contacted to establish banking.
By applying for and funding my HSA I represent that I:
1) am covered under a High Deductible Health Plan (HDHP);
2) am not covered by any other non- HDHP product;
3) am not covered by Medicare; and
4) cannot be claimed as a dependent on another person's tax return.

☐ I am not enrolling in a HSA at this time and understand that if I choose to at a later date, I must contact my health plan.

7. DEPENDENT INFORMATION: List all eligible dependents and attach required proof of dependency documents.*

☐ **Additional sheets attached. Any dependents not listed will be removed.**

Eligible Dependents Name – Last, First	Social Security No.	Circle Relationship	Birth Date	Gender
	— —	Spouse / Civil Union / Domestic Partner	/ /	
	— —	Child *(Natural, Adopted, Foster, Step, Legal Ward)*	/ /	
	— —	Child *(Natural, Adopted, Foster, Step, Legal Ward)*	/ /	

***See Instructions page for detailed information and Mailing Address**

FOR DIVISION USE ONLY

Event Reason: ☐
Effective Date
_____/_____/_____
Location No.
☐☐☐☐ ☐☐

EMPLOYEE CERTIFICATION — I certify that all the information supplied on this form is true to the best of my knowledge. I authorize a health premium deduction from my pension check, including initial check, last check benefit, withdrawal check, or return of contributions check as required by the State Health Benefits Commission. I also understand that there is no guarantee of continuous participation by medical service providers, either doctors or facilities in the plans. I authorize any hospital, physician, or health care provider to furnish my medical plan or its assignee with such medical information about myself, or my covered dependents on this application, as the assignee may require.

8. Employee Signature: _____ **Date:** _____/_____/_____

INSTRUCTIONS FOR THE SHBP/SEHBP HIGH DEDUCTIBLE ENROLLMENT and/or CHANGE FORM

SECTION 1 – EMPLOYEE INFORMATION – Complete entire section. Indicate Marital Status as follows: **S** (Single), **M** (Married), **C** (Civil Union), **DP** (Domestic Partner), **D** (Divorced), **W** (Widowed)

SECTION 2 – REASON FOR APPLICATION – *(check one)*

- New Retiree
- Medical Plan Change
- Enrolling in Medical *(Previously Waived)*
- Adding Dependents
- Deleting Dependents
- Survivor Enrollment

SECTION 3 – Indicate your date of retirement, former employer name and if you were a part-time employee when you retired.

SECTION 4 – LEVEL OF COVERAGE – Indicate your level of coverage by checking the appropriate block(s)

- Single – coverage for you only
- Parent/Child(ren) – coverage for you and any eligible child(ren) under age 26
- Member/Spouse/Civil Union – coverage for you and your eligible spouse or your Civil Union Partner
- Member/Domestic Partner – coverage for you and your eligible Domestic Partner
- Family – coverage for you, your eligible Spouse/Civil Union Partner/Domestic Partner, and child(ren) under age 26

SECTION 5 – HEALTH PLAN – Select only one plan.

SECTION 6 – HEALTH SAVINGS ACCOUNT (HSA) – Health Savings Accounts (HSA) are only available to retirees who have opted to take a HD medical plan. Your carrier will send information regarding enrolling in a Health Savings Account (HSA). Indicate whether or not you are signing up for the HSA plan.

SECTION 7 – DEPENDENT INFORMATION – List all eligible dependents and attach dependent documentation proof (see attached). If proper documentation has already been provided and approved, do not resubmit. If appropriate dependent documentation proof is not provided, dependents may not be enrolled. Ensure your dependents match your level of coverage (Section 4). Your child(ren) may be covered until the end of the calendar year they turn 26. Any dependents not listed will not be covered.

SECTION 8 – EMPLOYEE SIGNATURE – The member must read, sign, and date the application. If additional sheets are submitted with the application, check the block indicating such.

MISREPRESENTATION: Any person that knowingly provides false or misleading information is subject to criminal and civil penalties pursuant to N.J.S.A. 17:33A-6c.

MAIL COMPLETED APPLICATION TO:

New Jersey Division of Pensions & Benefits
Health Benefits Bureau
P.O. Box 299
Trenton, NJ 08625-02999

HB-0840-1217

State Health Benefits Program (SHBP) • School Employees' Health Benefits Program (SEHBP)

REQUIRED DOCUMENTATION FOR DEPENDENT ELIGIBILITY AND ENROLLMENT

The State Health Benefits Program (SHBP) and School Employees' Health Benefits Program (SEHBP) are required to ensure that only employees, retirees, and eligible dependents are receiving health care coverage under the Programs. The New Jersey Division of Pensions & Benefits (NJDPB) must guarantee consistent application of eligibility requirements within the plans. Employees or retirees who enroll dependents for coverage (spouses, civil union partners, domestic partners, children, disabled and/or overage children continuing coverage) MUST submit the following documentation in addition to the appropriate health benefits enrollment or change of status application. If proper documentation has already been provided and approved, do not resubmit. If appropriate dependent documentation proof is not provided, dependents may not be enrolled. **ANY DEPENDENTS NOT LISTED ON THE APPLICATION WILL NOT BE COVERED.**

DEPENDENTS	ELIGIBILITY DEFINITION	DOCUMENTATION REQUIRED
SPOUSE	A person to whom you are legally married.	A copy of the marriage certificate **and** a copy of the front page of the employee/retiree's federal tax return***** (Form 1040) from last year that includes the spouse. If filing separately, submit a copy of both spouses' tax returns that list the same address. If marriage occurred in the current calendar year, a copy of the tax return is not required. **Or**, if tax return is not available, provide a copy of a bank statement or bill (dated within 90 day of the application) that includes the names of both spouses and is received at the same address.
CIVIL UNION PARTNER	A person of the same sex with whom you have entered into a civil union.	A copy of the marriage certificate **and** a copy of the front page of the employee/retiree's federal tax return***** (Form 1040) from last year that includes the partner. If filing separately, submit a copy of both partners' tax returns that list the same address. If marriage occurred in the current calendar year, a copy of the tax return is not required. **Or**, if tax return is not available, provide a copy of a bank statement or bill (dated within 90 day of the application) that includes the names of both partners and is received at the same address.
DOMESTIC PARTNER	A person of the same sex with whom you have entered into a domestic partnership. Under P.L. 2003, c. 246, the Domestic Partnership Act, health benefits coverage is available to domestic partners of State employees, State retirees, or employees or retirees of a SHBP - or SEHBP - participating local public entity that has adopted a resolution to provide Chapter 246 health benefits.	A copy of the New Jersey certificate of domestic partnership dated prior to February 19, 2007, or a valid certification from another State or foreign jurisdiction that recognizes same-sex domestic partners **and** a copy of the front page of the employee/retiree's N.J. tax return***** from last year that includes the partner. If filing separately, submit a copy of both partners' NJ tax returns that list the same address. If Domestic Partnership occurred in the current calendar year, a copy of the tax return is not required. **Or**, if tax return is not available, provide a copy of a bank statement or bill (dated within 90 days of the application) that includes the names of both partners and is received at the same address.
CHILDREN	A subscriber's child until age 26, regardless of the child's marital, student, or financial dependency status – even if the young adult no longer lives with his or her parents. This includes a stepchild, foster child, legally adopted child, or any child in a guardian-ward relationship upon submitting required supporting documentation.	**Natural or Adopted Child** – A copy of the child's birth certificate showing the name of the employee/retiree as a parent. **Step Child** – A copy of the child's birth certificate showing the name of the employee/retiree's spouse or partner as a parent **and** a copy of the marriage/partnership certificate showing the names of the employee/retiree and spouse/partner. **Legal Guardian, Grandchild, or Foster Child** – Copies of final court orders with the presiding judge's signature and seal. Documents must attest to the legal guardianship by the employee.
DEPENDENT CHILDREN WITH DISABILITIES	If a covered child is not capable of self-support when he or she reaches age 26 due to mental illness or incapacity, or a physical disability, the child may be eligible for a continuance of coverage. Coverage for children with disabilities may continue only while (1) you are covered through the SHBP/SEHBP; (2) the child continues to be disabled; (3) the child is unmarried or does not enter into a civil union or domestic partnership; and (4) the child remains substantially dependent on you for support and maintenance. You may be contacted periodically to verify that the child remains eligible for coverage.	Documentation for the appropriate "child" type (as noted above) **and** a copy of the front page of the employee/retiree's federal tax return***** (Form 1040) from last year that includes the child. If Social Security disability has been awarded, or is currently pending, please include this information with the documentation that is submitted. Please note that this information is only verifying the child's eligibility as a dependent. The disability status of the child is determined through a separate process.
CONTINUED COVERAGE FOR OVERAGE CHILDREN	Certain children over age 26 may be eligible for continued coverage until age 31 under the provisions of P.L. 2005, c. 375. This includes a child by blood or law who: (1) is under the age of 31; (2) is unmarried or not a partner in a civil union or domestic partnership; (3) has no dependent(s) of his or her own; (4) is a resident of New Jersey or is a student at an accredited public or private institution of higher education, with at least 15 credit hours; and (5) is not provided coverage as a subscriber, insured, enrollee, or covered person under a group or individual health benefits plan, church plan, or entitled to benefits under Medicare.	Documentation for the appropriate "child" type (as noted above), **and** a copy of the front page of the child's federal tax return***** (Form 1040) from last year, and if the child resides outside of the State of New Jersey, documentation of full time student status must be submitted.

*****You may black out all financial information and all but the last four digits of any Social Security numbers on tax returns. To obtain copies of the documents listed above, contact the office of the town clerk in the city of the birth, marriage, etc., or visit these websites: ***www.vitalrec.com*** or ***www.studentclearinghouse.org*** Residents of New Jersey can obtain records from the State Bureau of Vital Statistics and Registration website: ***www.nj.gov/health/vital/index.shtml***