HR-0943-0220

State Health Benefits Program (SHBP) • State/Local Government Retirees

# RETIREE HEALTH BENEFIT ENROLLMENT AND/OR CHANGE FORM

## NON-MEDICARE ENROLLEES

**1. MEMBER INFORMATION** — Last Name | First | MI

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

| Phone Number | Email Address |
|---|---|
| ( ) | |

Street Address | City | State | Zip

**2. REASON FOR APPLICATION** (Check one)

- ☐ New Retiree
- ☐ Medical Plan Change
- ☐ Adding Dependents
- ☐ Deleting Dependents
- ☐ Enrolling in Medical (previously waived)
- ☐ Survivor Enrollment

Decedent's SS#_____

Reason_____

Date of Event _____/_____/_____

**3. DATE OF RETIREMENT**

_____/_____/_____

**FORMER EMPLOYER NAME**

_____

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. MEDICARE COVERAGE FOR DEPENDENT — PART A (Hospital Insurance) PART B (Medical Insurance)**

Does your Spouse/Partner have Part A? ☐ Yes ☐ No
Does your Spouse/Partner have Part B? ☐ Yes ☐ No
Does your Child have Medicare? ☐ Yes ☐ No
Medicare Proof Enclosed ☐

**6. HEALTH PLAN —** Check one box only. Not all State retirees will be eligible for NJ DIRECT10. See Instructions page for information.

☐ NJ DIRECT/NJ DIRECT2019* ☐ NJ DIRECT10* ☐ NJ DIRECT15* ☐ NJ DIRECT1525 ☐ NJ DIRECT2030
☐ Horizon OMNIA* ☐ Horizon HMO ☐ Horizon HMO1525 ☐ Horizon HMO2030 ☐ NJ DIRECT HD1500* ☐ NJ DIRECT HD4000*

For HD Plans only – Health Savings Account (HSA)

☐ I wish to establish an 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 an HSA at this time and understand that if I choose to at a later date, I must contact my health plan.

**Medicare eligible Spouses/Partners will be placed in a corresponding plan.*

**Note:** NJ DIRECT/NJ DIRECT 2019, NJ DIRECT HD1500, and Horizon OMNIA are not available to Chapter 330 plan participants.

**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 Last Name, First Name | 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.
☐☐☐☐ ☐☐

**MEMBER 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. **Anyone eligible for Medicare (age 65 or older or in receipt of Social Security Disability benefits for at least 24 months) must be enrolled under both Hospital Insurance (Part A) and Medical Insurance (Part B) in order to continue coverage under this program. PROOF OF ENROLLMENT IS REQUIRED.** If I or a covered dependent enroll in Medicare at a later date, I understand that the Health Benefits Bureau must be notified immediately. **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-6

**8. Member Signature** _____ **Date** _____/_____/_____

**INSTRUCTIONS FOR THE STATE HEALTH BENEFITS PROGRAM (SHBP)**
**RETIREE HEALTH BENEFIT ENROLLMENT AND/OR CHANGE FORM FOR NON-MEDICARE ENROLLEES**

**SECTION 1** – **MEMBER INFORMATION** – Complete entire section. Indicate Marital Status as follows: **S** (Single), **M** (Married), **CU** (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, or Survivor Enrollment.

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

**SECTION 4 – LEVEL OF COVERAGE** – Check the appropriate box.

**SECTION 5 – LEVEL OF MEDICARE COVERAGE** – Indicate whether your spouse/partner and/or child are enrolled in Medicare Parts A and B by checking the appropriate box. Anyone eligible for Medicare (age 65 or older or in receipt of Social Security Disability benefit(s) for at least 24 months) must be enrolled under both Medicare Part A (Hospital) and Part B (Medical) in order to continue coverage under this program. If enrolled, a photocopy of the Medicare card must be submitted with this application.

**SECTION 6 – HEALTH PLAN** – Check one box only. If you worked for the State and attained 25 years prior to July 1, 2007, or retired on a Disability Retirement on or before August 1, 2007, you may elect NJ DIRECT10. This does not apply to State Police and Corrections Officer retirees with a retirement date after July 1, 2005. Retirees who wish to enroll in a High Deductible Health Plan (HDHP) must complete a *Health Savings Account (HSA) Form*. Charts, applications, and forms can be found on our website at ***www.nj.gov/treasury/pensions***

**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. 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 – MEMBER SIGNATURE** – Read, sign, date, and attach required dependent documentation. If additional sheets are submitted with the application, check box 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 08625-0299**

HB-0840-0120

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. 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. 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. 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.<br>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.<br>**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.<br>**Legal Ward, 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***