



An Independent Licensee of the Blue Cross and Blue Shield Association

Individual Health Plan Contract Change Form

Instructions: Use a ballpoint pen to complete the application and follow guidelines listed below:

GUIDELINES							
Complete checked section if you are using this form to:	A	B	C	D	E	F	G
Remove the Policyholder	✓	✓	✓	✓	✓*	✓	✓
Add a member to current coverage	✓	✓		✓	✓*	✓	✓
Remove a member	✓	✓	✓		✓*	✓	✓
Remove a member and member moving to new policy	✓	✓	✓	✓	✓	✓	✓
Change to a different plan option to decrease level of benefits	✓				✓	✓	✓
Change billing option	✓					✓	✓

* If changing plan option



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Individual Health Plan Contract Change Form

A. EXISTING POLICYHOLDER INFORMATION (REQUIRED)	
Existing Policyholder Name (<i>First, Middle, Last</i>)	Social Security Number

Please check box to left of item(s) you are changing and provide complete information.

B. CONTRACT CHANGES	
<input type="checkbox"/>	Removing Policyholder: <input type="checkbox"/> Death <input type="checkbox"/> Medicare Eligible <input type="checkbox"/> Obtain Employer Group Coverage If obtaining employer group coverage: List group name _____ List carrier name _____ List date of event: ____/____/____ Existing benefits and billing information will remain unless you indicate change(s) on this form.
<input type="checkbox"/>	Adding Member: <input type="checkbox"/> Appointment as Legal Guardian (Provide legal documentation) <input type="checkbox"/> Adoption or Placement for Adoption <input type="checkbox"/> Birth <input type="checkbox"/> Care of a Foster Child <input type="checkbox"/> Dependent resuming full-time student status <input type="checkbox"/> Marriage List date of event: ____/____/____ List requested effective date: ____/____/____*. (Must be first day of the month.) *If requested effective date is not provided, Wellmark will assign the first of the month following signature date.
<input type="checkbox"/>	Removing Member: <input type="checkbox"/> Active Military Duty Service <input type="checkbox"/> Completion of full-time schooling of a dependent <input type="checkbox"/> Death <input type="checkbox"/> Dependent Child not a full-time student or permanently disabled reaches age 25 <input type="checkbox"/> Divorce/Annulment/Legal Separation <input type="checkbox"/> Marriage <input type="checkbox"/> Other, Specify _____ List date of event: ____/____/____ List name(s) of member(s) removed: _____ List requested effective date: ____/____/____ (Must be first day of the month) *If requested effective date is not provided, Wellmark will assign the first of the month following signature date.

C. NEW POLICYHOLDER INFORMATION						
New Policyholder Name (<i>First Middle, Last</i>)			Social Security Number		Requested Effective Date / /	
Mailing Address	Street	Bldg. Name/No., Apt. No.	PO Box	City	State	Zip
Billing Address (if different from Mailing Address)	Street	Bldg. Name/No., Apt. No.	PO Box	City	State	Zip
Telephone Number ()			E-mail Address			

D. MEMBERS ADDED TO EXISTING CONTRACT OR MEMBERS MOVED TO NEW CONTRACT										
<input type="checkbox"/>		First	MI	Last	Birthdate	Social Security Number	Gender	Full-time Student?	Disabled?*	Tobacco User?***
	Applicant						<input type="checkbox"/> M <input type="checkbox"/> F	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Spouse						<input type="checkbox"/> M <input type="checkbox"/> F	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Dependent						<input type="checkbox"/> M <input type="checkbox"/> F	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Dependent						<input type="checkbox"/> M <input type="checkbox"/> F	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
*Is disabled person(s) eligible for Medicare? <input type="checkbox"/> Yes <input type="checkbox"/> No ***Answer yes if the person listed has used tobacco during the 12 months immediately preceding the date of this application.										

E. PLAN CHANGES	
<input type="checkbox"/>	Complete this section to decrease your level of benefits (i.e., increasing your deductible within the same plan option, moving to a plan option that has lesser benefits) within your existing selected plan option. If you want to increase your level of benefits, you will need to complete a medically underwritten application. Select your new plan option by placing a check mark in the box prior to plan deductible level. Select first of the month effective date: ____/____/____* *The earliest effective date can be the first of the month following signature date.

Current Plan Options (Current Products Available for New Sales - Pool 5)				
Alliance SelectSM Comprehensive <input type="checkbox"/> 500 <input type="checkbox"/> 1000 <input type="checkbox"/> 1500 <input type="checkbox"/> 3000 <input type="checkbox"/> 4500	Alliance SelectSM Enhanced <input type="checkbox"/> 750 <input type="checkbox"/> 1250 <input type="checkbox"/> 1850 <input type="checkbox"/> 2500 <input type="checkbox"/> 5500 <input type="checkbox"/> 9500	Alliance SelectSM Value <input type="checkbox"/> 2000 <input type="checkbox"/> 5000	Blue Basics <input type="checkbox"/> 3000 <input type="checkbox"/> 5000	Blue PrioritySM HSA <input type="checkbox"/> 1700A <input type="checkbox"/> 1700B <input type="checkbox"/> 2750A <input type="checkbox"/> 2750B <input type="checkbox"/> 5400A Maternity (\$2500 Deductible): <input type="checkbox"/> Yes <input type="checkbox"/> No
Please indicate "Yes" or "No" for each of the following Wellmark optional benefits. If you do not answer "Yes" or "No" for each optional benefit, Wellmark will assign optional benefits as covered in existing policy. Blue Dental <input type="checkbox"/> Yes <input type="checkbox"/> No Supplemental Accident <input type="checkbox"/> Yes <input type="checkbox"/> No Contraceptives <input type="checkbox"/> Yes <input type="checkbox"/> No (Not available with Blue Basics and HSA products)				

Existing Policyholder Name <i>(First, Middle, Last)</i>	Social Security #
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E. PLAN CHANGES, cont'd.

Blue Transitions Plan Options

<input type="checkbox"/> Alliance Select Transitions 1500	<input type="checkbox"/> Alliance Select Transitions 2500	<input type="checkbox"/> Blue Priority HSA/Alliance Select Transitions 5400
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2001 to 2007 Plan Options (Existing Products No longer Offered for New Sales - Pool 4)

Alliance SelectSM Comprehensive <input type="checkbox"/> 300 <input type="checkbox"/> 750 <input type="checkbox"/> 1250 <input type="checkbox"/> 1750	Alliance SelectSM Enhanced <input type="checkbox"/> 600 <input type="checkbox"/> 1200 <input type="checkbox"/> 1800 <input type="checkbox"/> 2400 <input type="checkbox"/> 3000 <input type="checkbox"/> 4200	Alliance SelectSM Essential <input type="checkbox"/> 1500 <input type="checkbox"/> 2500	HSA <input type="checkbox"/> 1550 <input type="checkbox"/> 2550	Classic Blue[®] <input type="checkbox"/> 3000 <input type="checkbox"/> 5000
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Please indicate "Yes" or "No" for each of the following Wellmark optional benefits. If you do not answer "Yes" or "No" for each optional benefit, Wellmark will assign optional benefits as covered in existing policy. **Blue Dental** Yes No **Supplemental Accident** Yes No **Contraceptives** Yes No
(Not available with HSA products)

1996 to 2001 Plan Options (Existing Products No Longer Offered for New Sales - Pool 3)

Alliance Select						Classic Blue					
<input type="checkbox"/> Plan I	<input type="checkbox"/> Plan II	<input type="checkbox"/> Plan III	<input type="checkbox"/> Plan III - A	<input type="checkbox"/> Plan IV	<input type="checkbox"/> Plan V	<input type="checkbox"/> Plan V - A	<input type="checkbox"/> Plan VI	<input type="checkbox"/> Plan VII	<input type="checkbox"/> Plan VIII	<input type="checkbox"/> Plan IX	<input type="checkbox"/> Plan X

Please indicate "Yes" or "No" for each of the following Wellmark optional benefits. If you do not answer "Yes" or "No" for each optional benefit, Wellmark will assign optional benefits as covered in existing policy. **Contraceptives** Yes No **Supplemental Accident** Yes No

Prior to 1996 Plan Options (Existing Products No Longer Offered for New Sales - Pools 1 and 2)

<input type="checkbox"/> Plan I	<input type="checkbox"/> Plan II	<input type="checkbox"/> Plan III	<input type="checkbox"/> Plan IV	<input type="checkbox"/> Plan V	<input type="checkbox"/> HSA 2500
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Please indicate "Yes" or "No" to the following Wellmark optional benefit. If you do not answer "Yes" or "No", Wellmark will assign the optional benefit as covered in existing policy. **Supplemental Accident?** Yes No

Standard and Basic

Secure Blue	Secure Blue Select	Blue Care				
<input type="checkbox"/> \$1,000	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; text-align:center;">Select Providers</td> <td style="width:50%; text-align:center;">Non-Select Providers</td> </tr> <tr> <td style="text-align:center;"><input type="checkbox"/> \$1,000</td> <td style="text-align:center;"><input type="checkbox"/> \$1,000</td> </tr> </table>	Select Providers	Non-Select Providers	<input type="checkbox"/> \$1,000	<input type="checkbox"/> \$1,000	<input type="checkbox"/> \$1,500
Select Providers	Non-Select Providers					
<input type="checkbox"/> \$1,000	<input type="checkbox"/> \$1,000					

F. BILLING INFORMATION - Complete if new policyholder, changing billing option or selecting "Use Billing information on file with Wellmark".

<input type="checkbox"/>	<p>How do you want to pay for health premiums and service fees? Note: All billing periods are based on a calendar year.</p> <p><input type="checkbox"/> 1. Direct Bill. If so, on what basis? <input type="checkbox"/> Semi-annually <input type="checkbox"/> Annually</p> <p><input type="checkbox"/> 2. Use billing information on file with Wellmark. (Available only for those with existing Wellmark individual coverage.)</p> <p><input type="checkbox"/> 3. Automatic Account Withdrawal from Applicant's account.</p> <p><input type="checkbox"/> 4. Automatic Account Withdrawal from account other than Applicant's.</p> <p>If you checked 3 or 4, please complete the following:</p> <p>If so, on what basis? <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-annually <input type="checkbox"/> Annually</p> <p>Date of withdrawal: <input type="checkbox"/> 1st of the month <input type="checkbox"/> 5th of the Month</p> <p>From: <input type="checkbox"/> Checking <i>(Attach a voided check)</i></p> <p><input type="checkbox"/> Savings <i>(If you want to have premiums and service fees withdrawn from your savings account, please complete form M-5779.)</i></p> <p>If Direct Bill is not selected:</p> <p>I hereby certify that I have read and understand the section below entitled "Authorization and Certification," and agree to the terms regarding automatic premium withdrawals as described therein. As the Bank Account Holder, I authorize Wellmark to make automatic withdrawals from the account shown on the attached voided check in the amount of the premium and service fees. I understand and agree that notices of any premium and service fee adjustments provided to the Policyholder shall constitute notice to the undersigned of any such adjustment. This authorization supersedes and replaces any previous authorization given by me for automatic premium withdrawal.</p> <p>Bank Account Holder's Signature (if other than Policyholder): _____ Date: ____/____/____</p> <p>You may cancel automatic account withdrawal at any time. However, we need to receive your written notification at least 20 days before your scheduled withdrawal.</p>	<p>Please do not send payment with this form.</p> <p>IF PAYING BY AUTOMATIC WITHDRAWAL FROM CHECKING, ATTACH VOIDED CHECK HERE.</p>
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Effective Dates

When adding members, effective dates will be:

Event:	Effective Date:
Birth	First day of the month of the birth or first day of the month following birth
Adoption/Placement for Adoption	First day of the month in which physical custody takes place; if physical custody within 60 days of birth, first day of the month of the birth
Appointment as Legal Guardian	First day of the month in which the court makes the appointment
Care of Foster Child	First day of the month in which the child enters home
Dependent resumes full-time student status	First day of the month the event occurs or first of the month following event
Marriage	First day of the month following marriage; or, if the application is signed before the first day of the month of the marriage, the effective date is the first day of the month of the marriage.

Existing Policyholder Name (First, Middle, Last) Social Security #

Adding and Removing Member Due to an Event

Adding Members. The following events allow you to add the person directly affected by the event:

- Appointment as a Legal Guardian** of a child.
- Birth, or Adoption, or Placement for Adoption** of a child.
- Care of a Foster Child** (when placed in your home by an approved agency).
- Dependent** child previously covered under this policy resumes full-time student status.
- Marriage**, which permits addition of the new spouse and the new spouse's children.

For birth, adoption or placement for adoption of a child, you must submit an application within 60 days of the event. If you do not submit an application within 60 days of the event, the child to be added will need to prove insurability.

For other events that allow adding members, you must submit an application to us within 31 days of the date of the event to ensure that the new person will not have to answer health questions to prove insurability. If you do not submit an application within 31 days of the event, the person to be added will need to prove insurability.

Removing Members. The following events may require or allow you to remove family members from your coverage:

- Active Military Duty Service** of a member.
- Completion of Full-time Schooling** of a dependent child.
- Death.**
- Dependent Child** who is not a full-time student or permanently disabled reaches age 25.
- Divorce, Annulment or Legal Separation.**
- Marriage** of a dependent child.

Authorization and Certification

I certify that I have carefully and fully read the Authorization and Certification language appearing below.

I certify that I am legally authorized to make changes in coverage for myself and on behalf of all other persons named on my current policy and in this form, and I further have confirmed with all persons named on my current policy and on this form that my signature is binding to change coverage. If I have made changes in my plan selection, I understand that I am applying for coverage as indicated on this form which is underwritten by Wellmark, Inc., doing business as Wellmark Blue Cross and Blue Shield of Iowa ("Wellmark"), providing the specified individual health care and dental coverages. I further understand that coverage applied for will not start until this form and the appropriate premium and service fee payment amount, if applicable, are received and accepted by Wellmark.

The statements and answers set forth in this form are full, true, and correct. I have consulted with each other person named in this form to confirm that information about them is full, true, and correct. I understand that Wellmark will rely on the completeness and truthfulness of the information given in the statements made in this form or by telephone or in writing to Wellmark, and that, if I have made any fraudulent or material false statements or misrepresentations to Wellmark, or have knowingly or unknowingly failed to disclose any material fact in this form, Wellmark will be entitled to declare coverage applied for void and to refuse allowance of benefits to any person thereunder.

If I answered "No" to the tobacco user question for any person listed in Section D, that person is eligible for a special tobacco non-user rate. If this status changes, I must notify Wellmark immediately. Wellmark may require me to recertify this status in the future. If Wellmark determines within the initial two years that this status is incorrect, Wellmark will retroactively collect historical differences in premiums before claims will be paid, and will start applying the tobacco user rate on the first of the month following Wellmark's receipt of this information.

I understand and agree that the amount of my periodic premium payment and service fee, if applicable, will change as provided in the policy being applied for and from time to time based on changes in my coverage, including but not limited to, changes in benefits, payment obligations (such as deductible, coinsurance and copayments), the number of covered family members, members' ages, changes in tobacco user status, or other factors that require adjustments to the total premium and service fee, if applicable. These changes may occur at times other than at annual or other policy renewal.

I further understand and agree that, if I have elected to authorize automatic premium withdrawals from a deposit account, the automatic withdrawal will change periodically to correspond with the applicable premium and service fee. My authorization for automatic premium withdrawals shall include authorization for automatic withdrawal of any changed amount unless I call or provide my bank with written notice not less than three (3) business days before a scheduled withdrawal to stop the payment. If I call my bank to stop payment, I may be required to provide a written request within fourteen (14) days after my call. I will be responsible for any fee assessed by my bank for stop-payment orders that I make.

G. Signature

I have read and understand the Authorization and Certification language and hereby confirm the authority of Wellmark to make automatic withdrawals from my deposit account as described therein. This authorization supersedes and replaces any previous authorizations given by me for automatic premium withdrawal.

Existing Policyholder Signature X _____ Date ____/____/____

New Policyholder Signature X _____ Date ____/____/____

Agent Signature, if applicable X _____ Agent No. | | | | | | | | | |