* IMPORTANT INFORMATION *

You should carefully complete this enrollment form and fill in the required information as neatly and clearly as possible. This information is an important part of your official record with the Fund. Most of the items clearly indicate the information required; however, instructions are listed below for those items which might need explaining.

- Fill in your Social Security Number as it appears on your Social Security card.
- Please fill in the month, day and year when asked to provide dates of birth. The year alone is not enough.
- The Fund has the right to request proof of marriage, of divorce, or of birth to verify the information given and to determine the eligibility of a dependent for enrollment.

Eligible dependents are:

Your lawful spouse. In the event of a final dissolution of your marriage (divorce), the spouse is no longer eligible for coverage and you should immediately complete and mail a new enrollment form to the Fund Office to delete your spouse as your dependent. If you fail to do so, you may be held responsible for repayment of any benefits provided to which your former spouse is no longer entitled.

(CERTIFICATION REQUIRED: Certified Marriage Certificate, recorded final marriage dissolution document.)

Your domestic partner. Domestic Partners are defined as same sex and opposite sex couples registered with any state or local government agency authorized to perform such registrations.

(CERTIFICATION REQUIRED: Certificate of Domestic Partnership or equivalent form.)

Your children under age 26 including your natural children, stepchildren (including children of your domestic partner) who live in your household, legally adopted children, children for whom you have been appointed Legal Guardianship, foster children, children designated as your Dependent in a valid and approved QMCSO.

(CERTIFICATION REQUIRED: Birth Certificate, Legal Guardianship papers, QMCSO.)

An unmarried child of any age who is unable to earn a living because of a disability is also considered an eligible dependent, provided the child was both disabled and eligible under the Fund before reaching age 26 and provides proof of disability within 31 days of reaching the age limitation. **(CERTIFICATION REQUIRED: Physician Statement.)**

NORTHERN CALIFORNIA SOFT DRINK INDUSTRY AND TEAMSTERS HEALTH & WELFARE FUND

4160 DUBLIN BLVD., SUITE 100 | DUBLIN, CA 94568
TELEPHONE: (855) 690-7250 | FAX: (925) 833-7301

ENROLLMENT FORM

LAST NAME		FIRST NAME		M.I.

SOCIAL SECURITY NUMBER	SEX ☐ M ☐ F	DATE OF BIRTH	MAIN NUMBER	MOBILE NUMBER

MAILING ADDRESS (STREET OR P.O. BOX)	EMPLOYER	LOCAL UNION	HIRE DATE

CITY	STATE	ZIP	EMAIL:

WOULD YOU LIKE TO BE CONTACTED OF ANY CHANGES IN YOUR BENEFITS VIA TEXT OR EMAIL? ☐ **YES** ☐ **NO**

CHOICE OF PLANS

MEDICAL SELECTION – CHOOSE ONE:

- ☐ **ENHANCED PPO PLAN**
- ☐ **BASIC PPO PLAN**
- ☐ **KAISER PERMANENTE****

(ENROLLMENT IS RESTRICTED TO PARTICIPANTS WITH 18+ MONTHS OF COVERAGE)

- ☐ **NO CHANGE**

DENTAL SELECTION – CHOOSE ONE:

- ☐ **UNITED HEALTHCARE (UHC) DENTAL**
- ☐ **ANTHEM DENTAL****

(ENROLLMENT IS RESTRICTED TO PARTICIPANTS WITH 18+ MONTHS OF COVERAGE)

- ☐ **NO CHANGE**

PLEASE NOTE: ***IF YOU ARE ENROLLING IN KAISER OR THE UHC DENTAL PLAN, YOU MUST ALSO COMPLETE AN ENROLLMENT FORM FOR THAT PLAN. PLEASE CONTACT THE FUND OFFICE FOR A FORM.***

DEPENDENT INFORMATION

Please complete the following dependent enrollment information. Definitions on first page.

Your dependents will not be enrolled until this information is provided.

SPOUSE: Copy of marriage certificate

DOMESTIC PARTNER: Attach a state of California declaration of domestic partnership or other local registry document.

CHILD: SON, DAUGHTER, STEP CHILD, Other – Copy of birth certificate, adoption papers or court papers establishing your legal guardianship in lieu of birth certificate for each child

MARITAL STATUS

☐ **SINGLE** ☐ **MARRIED** ☐ **DOMESTIC PARTNER** ☐ **DIVORCED**

DATE OF MARRIAGE / DIVORCE / DOMESTIC PARTNER REGISTRATION

LAST NAME	FIRST NAME	M.I.	SEX	D.O.B	SOCIAL SECURITY#	RELATION*	DISABLED
			☐ M ☐ F			☐ SPOUSE ☐ DOMESTIC PARTNER	Y / N
			☐ M ☐ F			☐ CHILD ☐ STEP CHILD ☐ OTHER*	Y / N
			☐ M ☐ F			☐ CHILD ☐ STEP CHILD ☐ OTHER*	Y / N
			☐ M ☐ F			☐ CHILD ☐ STEP CHILD ☐ OTHER*	Y / N

(SEE REVERSE SIDE)

COMPLETE THE SECTION BELOW AND ENCLOSE A COPY OF THE MEDICARE CARD IF YOU OR A DEPENDENT(S) ARE ENROLLED IN MEDICARE

PLEASE LIST THE INDIVIDUAL RECEIVING MEDICARE:	RECEIVING PART A? ☐ YES ☐ NO	EFFECTIVE DATE A: _____/_____/_____
NAME:_____	RECEIVING PART B? ☐ YES ☐ NO	EFFECTIVE DATE B: _____/_____/_____
NAME:_____		

YOU MUST COMPLETE IF YOU CHECKED YES TO TRANSPLANT OR RECEIVING KIDNEY DIALYSIS

PLEASE LIST THE INDIVIDUAL RECEIVING DIALYSIS OR TRANSPLANT	RECEIVED KIDNEY TRANSPLANT ☐ YES ☐ NO	DATE OF TRANSPLANT: _____/_____/_____
NAME:_____	RECEIVING DIALYSIS ☐ YES ☐ NO	DATE OF FIRST TREATMENT: _____/_____/_____
NAME:_____		

BENEFICIARY INFORMATION

DEATH BENEFITS ARE TO BE PAID TO:

NAME _____ RELATIONSHIP _____ ALLOCATION _____ %

NAME _____ RELATIONSHIP _____ ALLOCATION _____%

Give person(s) full Legal Name and Relationship. If a minor, also list Guardian. The person(s) named will be considered your beneficiary unless you specify otherwise.

PLEASE READ CAREFULLY – SIGNATURE REQUIRED

▪ I understand that all questions must be answered before Northern California Soft Drink Industry and Teamsters Health & Welfare Fund can consider this enrollment request.

▪ I have read and understand the requirements, terms, conditions, limitations, provisions, and other information discussed in the enrollment materials.

▪ For the purposes of processing claims for benefits, on behalf of myself and enrolling family members, I AUTHORIZE the release and exchange of full information regarding school enrollment, medical history, consultation, or treatment, including copies of all records between and among all doctors, dentists, pharmacists, hospitals or other institutions providing care, treatment, consultation, drugs or supplies, and any insurance carrier, service plan, union, trust fund, provider network, school, or employer, to the extent permitted by law.

▪ I declare that the statements contained in this enrollment form are, to the best of my belief and knowledge, true and correct and that no material information has been withheld or omitted.

▪ I understand that it is illegal, and is a felony in some states, for any person to knowingly and with intent to injure, defraud, or deceive any insurer, file a statement of claim or an enrollment request containing any false, incomplete, or misleading information. In some states, anyone found guilty of insurance fraud is subject to fines, confinement in prison, and/or denial of insurance benefits.

▪ The Fund will not share any contact information with anyone and promises to text or email you only when something about your health benefits is important. Please contact the Fund to opt out of these services at any time.

SIGNATURE: _____ **DATE**: _____

Be sure to sign and date this form and return it to the Trust Fund Office at:

Northern California Soft Drink Industry and Teamsters Health & Welfare Trust

4160 Dublin Blvd., Suite 100, Dublin, CA 94568