

Member Transaction Form

Fallon Select HSA-Qualified Plan



Fallon Health
Fallon Health & Life Assurance Co., Inc.

THE FOLLOWING SECTION IS TO BE FILLED OUT BY THE EMPLOYER:

| | | |
|--------------------------|-------------------------------|------------------------------|
| Group number 55508-31 | Group name Town of Concord | Effective date: (MM/DD/YYYY) |
|--------------------------|-------------------------------|------------------------------|

Please check off the reason you are filling out this form:

Adding coverage: New hire Annual open enrollment Other (Please explain in the Remarks section below.)

Ending coverage:

- Termination of employment Change to other insurance (Please provide the name of the other insurance in the Remarks section below.)
 Other (Please explain in the Remarks section below.)

Changes to existing coverage: (Please choose an option and explain in the Remarks section below.)

- Change to:** Individual plan Family plan COBRA Other
- Addition of a dependent (Please complete the dependent section of this form.) Date of qualifying event:[†] _____
 Removal of a dependent Proof of qualifying event documentation included
 Change in name, address or other application information Other

Remarks:

This form is not complete without an authorized employer signature on page 2.

THE FOLLOWING SECTIONS ARE TO BE FILLED OUT BY THE EMPLOYEE (subscriber):

Please complete all applicable fields in this section.

Provider network: Direct Care* Select Care Fallon Preferred Care Steward Community Care*

Plan name: _____

| | | | |
|------------|---------------------|-----------|--|
| First name | Middle initial (MI) | Last name | Gender |
| | | | <input type="checkbox"/> Male <input type="checkbox"/> Female |

| | | |
|-------------|------------------|-------------------------|
| Maiden name | Primary language | Birth date (MM/DD/YYYY) |
|-------------|------------------|-------------------------|

Street address

| | | |
|------|-------|----------|
| City | State | ZIP code |
|------|-------|----------|

Mailing address (if different from street above)

| | | |
|------|-------|----------|
| City | State | ZIP code |
|------|-------|----------|

| | |
|---|--------------|
| Would you be interested in receiving communications from Fallon via email? If so, please check the box and provide your email address: <input type="checkbox"/> | Home phone |
| | Mobile phone |

| | | |
|--------------------------|-------------------------|------------|
| Social Security number** | Date hired (MM/DD/YYYY) | Work phone |
|--------------------------|-------------------------|------------|

Race (please choose one) White Black Hispanic Asian/Pacific Islander American Indian/Alaskan Native Other

Work status (please choose one) Full time Part time Retired COBRA

| | | |
|----------------------------------|--------------|------------|
| Average # of hours worked weekly | Department # | Employee # |
|----------------------------------|--------------|------------|

Does your spouse have health insurance from another source? Yes No

Please provide the name of your selected primary care provider (PCP). Is this your current PCP? Yes No

| | | |
|------------|----|-----------|
| First name | MI | Last name |
|------------|----|-----------|

[†]Documentation required for qualifying event.

Benefits administrator: Please mail the white and yellow copies of this form to: Fallon Health Enrollment Operations, 10 Chestnut St., Worcester, MA 01608. The pink copy is for the employee. Or email form to: EnrollmentRequests@fallonhealth.org Or fax form to: 1-508-831-1136.

DEPENDENT SECTION:

In this section, please list all dependents covered under this plan. If you need more room, please use an additional Member Transaction Form.

| | | | | | |
|--|--|------|---|--|---|
| Dependent 1: First name | | MI | Last name (include maiden name if applicable) | | Gender <input type="checkbox"/> Male <input type="checkbox"/> Female |
| Relation to you | | | Social Security number** | | |
| Primary language | | Race | Birth date (MM/DD/YYYY) | | |
| Street address (if different from subscriber's) | | | | | |
| Please provide the name of this dependent's primary care provider (PCP). Is this the dependent's current PCP? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | |
| First name | | MI | Last name | | |
| Dependent 2: First name | | MI | Last name (include maiden name if applicable) | | Gender <input type="checkbox"/> Male <input type="checkbox"/> Female |
| Relation to you | | | Social Security number** | | |
| Primary language | | Race | Birth date (MM/DD/YYYY) | | |
| Street address (if different from subscriber's) | | | | | |
| Please provide the name of this dependent's primary care provider (PCP). Is this the dependent's current PCP? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | |
| First name | | MI | Last name | | |
| Dependent 3: First name | | MI | Last name (include maiden name if applicable) | | Gender <input type="checkbox"/> Male <input type="checkbox"/> Female |
| Relation to you | | | Social Security number** | | |
| Primary language | | Race | Birth date (MM/DD/YYYY) | | |
| Street address (if different from subscriber's) | | | | | |
| Please provide the name of this dependent's primary care provider (PCP). Is this the dependent's current PCP? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | |
| First name | | MI | Last name | | |
| Dependent 4: First name | | MI | Last name (include maiden name if applicable) | | Gender <input type="checkbox"/> Male <input type="checkbox"/> Female |
| Relation to you | | | Social Security number** | | |
| Primary language | | Race | Birth date (MM/DD/YYYY) | | |
| Street address (if different from subscriber's) | | | | | |
| Please provide the name of this dependent's primary care provider (PCP). Is this the dependent's current PCP? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | |
| First name | | MI | Last name | | |
| Dependent 5: First name | | MI | Last name (include maiden name if applicable) | | Gender <input type="checkbox"/> Male <input type="checkbox"/> Female |
| Relation to you | | | Social Security number** | | |
| Primary language | | Race | Birth date (MM/DD/YYYY) | | |
| Street address (if different from subscriber's) | | | | | |
| Please provide the name of this dependent's primary care provider (PCP). Is this the dependent's current PCP? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | |
| First name | | MI | Last name | | |

I understand that my signature below means that I have read and I understand the contents of this form, and that I agree to the terms and conditions located on the back of this form.

X _____
Employee signature (REQUIRED) Print name here Date

X _____
Employer signature (REQUIRED) Print name here Date

Group name (please print) _____

* Direct Care and Steward Community Care provide access to networks that are smaller than the Select Care network. In these plans, members have access to network benefits only from the providers in their respective network. Please consult the respective provider directory—paper copies can be requested by calling our Customer Service Department at 1-800-868-5200—or visit the provider search tool at fallonhealth.org to determine which providers are included in Direct Care and Steward Community Care.

**Required for tax purposes