

## GROUP CHANGE FORM

**EMPLOYMENT INFORMATION [TO BE COMPLETED BY YOUR PLAN ADMINISTRATOR] – COMPLETE ALL SECTIONS**

<b>GROUP NAME [EMPLOYER]</b>	<b>DIVISON</b>	<b>CLASS</b>	<b>CLIENT ID</b>
<b>EMPLOYEE LAST NAME</b>	<b>EMPLOYEE FIRST NAME</b>		<b>Gender</b> <input type="checkbox"/> Male <input type="checkbox"/> Female
<b>EFFECTIVE DATE [MM/DD/YYYY]</b>	<b>ANNUAL SALARY</b>	<b>NUMBER OF HRS WORKED PER WEEK</b>	

**REQUESTED CHANGES [TO BE COMPLETED BY PLAN ADMINISTRATOR] EFFECTIVE DATE OF CHANGES: \_\_\_\_\_**

<input type="checkbox"/> <b>NAME CHANGE</b>		<input type="checkbox"/> <b>ADDRESS CHANGE</b>				
<input type="checkbox"/> <b>Termination [Last Day Actively at Work]</b>		<input type="checkbox"/> <b>Salary Change [New Salary]</b>		Salary Type: <input type="checkbox"/> Hourly <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Semi-Monthly <input type="checkbox"/> Annual		
<input type="checkbox"/> <b>CLASS CHANGE [NEW CLASS]</b>			<input type="checkbox"/> <b>DIVISION CHANGE [NEW DIVISION]</b>			
<input type="checkbox"/> <b>ADD SPOUSE/DEPENDENT</b>			<input type="checkbox"/> <b>REMOVE SPOUSE/DEPENDENT</b>			
If adding a spouse please indicate what coverage spouse has through his/her employer: Health: <input type="checkbox"/> Single <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Waived <input type="checkbox"/> None Dental: <input type="checkbox"/> Single <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Waived <input type="checkbox"/> None						
RELATIONSHIP	LAST NAME	FIRST NAME	GENDER	DATE OF BIRTH MM/DD/YYYY	STUDENT	DISABLED DEPENDENT
SPOUSE			<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE			<input type="checkbox"/> Yes <input type="checkbox"/> No
CHILD			<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE			<input type="checkbox"/> Yes <input type="checkbox"/> No
CHILD			<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE			<input type="checkbox"/> Yes <input type="checkbox"/> No
CHILD			<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE			<input type="checkbox"/> Yes <input type="checkbox"/> No
CHILD			<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE			<input type="checkbox"/> Yes <input type="checkbox"/> No

**BENEFICIARY CHANGE:**

LAST NAME	FIRST NAME	RELATIONSHIP	REVOCABLE OR IRREVOCABLE	%

*If you name an irrevocable beneficiary and wish to change it at a later date, the current beneficiary would be required to approve the change.*

**TRUSTEE DESIGNATION: This section is to be completed only if the beneficiary designated above is under the age of majority (Trustee to receive any amount due to any beneficiary under the age of 18)**

<b>TRUSTEE NAME</b>	<b>RELATIONSHIP</b>
---------------------	---------------------

COVERAGE CHANGE:

EFFECTIVE DATE OF CHANGE: \_\_\_\_\_

Health: <input type="checkbox"/> Single <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Waive	REASON FOR CHANGE
Dental: <input type="checkbox"/> Single <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Waive	REASON FOR CHANGE

If you or your dependents are presently covered for Extended Health Care and/or Dental Care benefits under another Group Insurance Plan you may opt out coverage by choosing the applicable box for each benefit.

I refuse coverage for myself, my spouse and my dependents	<input type="checkbox"/> Extended Health Coverage	<input type="checkbox"/> Dental Coverage
I refuse coverage for my spouse and my dependents	<input type="checkbox"/> Extended Health Coverage	<input type="checkbox"/> Dental Coverage

**PLEASE PROVIDE THE DETAILS OF SPOUSE'S COVERAGE BELOW**

Extended Health Coverage	<input type="checkbox"/> Single <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Waived <input type="checkbox"/> None	Name of Insurance Co:
Dental Coverage	<input type="checkbox"/> Single <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Waived <input type="checkbox"/> None	Spouse's Employer:

**DECLARATION & AUTHORIZATION**

*I declare that the information provided above is accurate and true, and hereby authorize the Plan Administrator to use this information to administer the Group Benefits; obtain quotes for underwritten/insured products within the plan; verify the identity and eligibility of the plan member, spouse or eligible dependents; adjudicate and pay eligible claims; audit plans and prepare reports. I understand that this information will only be provided to those insurers affiliated with the Plan Administrator and acknowledge that I have obtained the consent of this Employee and Spouse/Partner to provide this information*

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**PRIVACY & CONFIDENTIALITY**

We protect our customers' confidential information. A combination of industry, legislated and our own corporate privacy and confidentiality requirements govern the level of detail shared about any plan member and his or her dependents' benefits. In terms of telephone inquiries to the Plan Administrator, the information provided varies based on the relationship of the person making the inquire to the insured (e.g. plan administrator, plan member or dependent). After the caller has been screened for appropriate identification, only the information pertaining to the specific claim or treatment in question is shared.

**EMPLOYER AUTHORIZATION**

I declare that the information provided above is accurate and true, and hereby authorize the Plan Administrator to use this information to administer the Group Benefits; obtain quotes for underwritten/insured products within the plan; verify the identity and eligibility of the plan member, spouse or eligible dependents; adjudicate and pay eligible claims; audit plans and prepare reports. I understand that this information will only be provided to those insurers affiliated with the Plan Administrator and acknowledge that I have obtained the consent of this Employee and Spouse/Partner to provide this information.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_