



**Employer:**  
**Desired Effective Date:**  
**Level of Coverage:**

**Last Name:**  
**Plan Chosen:**

# Employee Health Evaluation & Enrollment Form

INSTRUCTION: THIS FORM IS TO BE COMPLETED BY THE EMPLOYEE

**Employer Information**

Employer Name:	Date of Hire:	Effective Date of Coverage:
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**Employee Information**

Last name	First Name	Middle Initial	Date of Birth	Social Security #	
Home Mailing Address	Street	Apt #	City	State	Zip Code
Home Phone #	E-Mail Address	Gender	Height	Weight	Tobacco User <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Level of Coverage Chosen :</b>	<b>Marital Status:</b> <input type="checkbox"/> Single <input type="checkbox"/> Married (date: _____) <input type="checkbox"/> Divorced (date: _____) <input type="checkbox"/> Separated (date: _____) <input type="checkbox"/> Widowed (date: _____)				

\*Deductible Plans Available: circle your choice and write your answer under plan selection above

**~\$500    ~\$2000    ~\$5000    ~\$6350 Value Plan**

If Applying for Dependent Coverage, Complete Section Below for all Dependents to be Covered:

(Common Law spouses are NOT eligible for coverage, unless required by law. Use additional paper if necessary.)

	First Name & Middle Initial	Last Name (if different from applicant)	Step-Child	Gender	Date of Birth	Height	Weight	Tobacco User (Yes or No)	Social Security Number
Sp									
Ch1									
Ch2									
Ch3									
Ch4									

**Medical Information**

To the best of your knowledge, answer the following questions for yourself and all dependents you are enrolling. The information on this form is designed to assist in VEBA Trust Plan evaluation of your group.

**1. In the past three (3) years has any person enrolling consulted a health care provider, received treatment (including prescription medications), or been hospitalized for any of the following conditions, disorders, or diseases?**

	Yes	No		Yes	No
Brain or Nervous System.....	<input type="checkbox"/>	<input type="checkbox"/>	Thyroid or Pituitary Disorder.....	<input type="checkbox"/>	<input type="checkbox"/>
Nervous, Mental, or Emotional Disorder.....	<input type="checkbox"/>	<input type="checkbox"/>	Diabetes or Sugar in Urine.....	<input type="checkbox"/>	<input type="checkbox"/>
Drug or Alcohol Abuse.....	<input type="checkbox"/>	<input type="checkbox"/>	Disease of the Muscles.....	<input type="checkbox"/>	<input type="checkbox"/>
Epilepsy or Cerebral Palsy.....	<input type="checkbox"/>	<input type="checkbox"/>	Bone or Joint Disorder.....	<input type="checkbox"/>	<input type="checkbox"/>
Abnormal Blood Pressure.....	<input type="checkbox"/>	<input type="checkbox"/>	Arthritis, Rheumatism, Bursitis.....	<input type="checkbox"/>	<input type="checkbox"/>
Heart or Circulatory System.....	<input type="checkbox"/>	<input type="checkbox"/>	Disorders of Back or Spine.....	<input type="checkbox"/>	<input type="checkbox"/>
Chest Pain or Stroke.....	<input type="checkbox"/>	<input type="checkbox"/>	Lungs or Respiratory System.....	<input type="checkbox"/>	<input type="checkbox"/>
Blood Disorder or Varicose Veins.....	<input type="checkbox"/>	<input type="checkbox"/>	Emphysema, Tuberculosis, Chronis Obstructive		
Digestive or Gastrointestinal Tract.....	<input type="checkbox"/>	<input type="checkbox"/>	Pulmonary Disease, or Asthma.....	<input type="checkbox"/>	<input type="checkbox"/>
Cirrhosis or Hepatitis.....	<input type="checkbox"/>	<input type="checkbox"/>	Multiple Sclerosis or Cystic Fibrosis.....	<input type="checkbox"/>	<input type="checkbox"/>
Liver, Pancreas, or Kidney.....	<input type="checkbox"/>	<input type="checkbox"/>	Skin or Collagen Disease.....	<input type="checkbox"/>	<input type="checkbox"/>
Rectum, Prostate or Hernia.....	<input type="checkbox"/>	<input type="checkbox"/>	Cancer, Leukemia, or Hodgkin's Disease.....	<input type="checkbox"/>	<input type="checkbox"/>
Genitourinary System.....	<input type="checkbox"/>	<input type="checkbox"/>	Lymphatic Vessels or Glands.....	<input type="checkbox"/>	<input type="checkbox"/>
Breast or Reproductive Organs.....	<input type="checkbox"/>	<input type="checkbox"/>	Any Physical Deformity or Defect.....	<input type="checkbox"/>	<input type="checkbox"/>
Endocrine or Adrenal Disorder.....	<input type="checkbox"/>	<input type="checkbox"/>			

**2.** Are you or any dependent currently pregnant or undergoing fertility treatment?  Yes  No

**3.** Are you or any dependent anticipating surgery?  Yes  No

**4.** Are you or any dependent an organ or tissue transplant donor, recipient or candidate?  Yes  No

**5.** Is anyone applying for coverage currently disabled, restricted, or unable to perform the normal activities of daily living or self care?  Yes  No

**6.** Is anyone currently taking medication?  Yes  No

**7.** Have you been diagnosed, whether treated or untreated, with any condition, whether mentioned above or not?  Yes  No

For any "Yes" answers provided in the above section, list the details for each "yes" answer in the section below. Use additional paper if necessary.

Question No.	Person	Age	Medical Condition or Reason for Treatment	Type of Treatment	Medications & Dosages	Treatment Date(s)	Recovery Status

Have you or your dependents been covered under this employer's plan or any other major medical plan(s) at any time in the past 12 months? Yes   
 No  If yes: a) Who was covered?  Employee  Spouse  Child(ren)  
 b) Name of Carrier: \_\_\_\_\_ c) Carrier Phone #: \_\_\_\_\_ d) Policy/ID #: \_\_\_\_\_  
 e) Effective Date: \_\_\_\_\_ f) Termed Date: \_\_\_\_\_ g) Reason: \_\_\_\_\_

**Signature (This form must be signed and dated)**

I, the Applicant, understand, to the best of my knowledge, the information provided on this Employee Health Evaluation & Enrollment Form is complete and accurate. I, the Applicant, understand that if I have misstated or omitted any information on this form, *VEBA Trust Plan* reassess premium applied to my employer group and/or me, deny claims, or terminate *VEBA Trust Plan* coverage in accordance with applicable law. *VEBA Trust Plan*, its reinsurers, and their authorized representatives are authorized to obtain medical information in order to evaluate the information contained in this Employee Health Evaluation & Enrollment Form.

Applicant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Complete if you are WAIVING MEDICAL Benefits for you and/or your dependents**

I waive medical benefits for:  Employee  Spouse  Child(ren)  Employee and Family  
 Reason for waiving benefits:  Spouse's employer plan  Medicare/Medicaid  Military  COBRA  Individual  
 Other: \_\_\_\_\_

If I have waived benefits for myself and/or my dependents (including my spouse) because of other health benefits, I may in the future be able to enroll myself and/or my dependents in this plan, provided that I request enrollment within 31 days after my other benefits end because of involuntary loss of benefits (divorce, death, legal separation, termination of employment, reduction in number of hours of employment). In addition, if I have new dependent as a result of marriage, birth, adoption, or placement for adoption, I may be able to enroll myself and my dependents, provided that I request enrollment within 31 days after the date of the event. I further understand that, other than these qualifying events, if this form is submitted after the enrollment period, I cannot enroll until the next annual enrollment period.

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

**Employee Statement / Authorization to Release Medical Information**

I hereby apply for participation in my employer's Employee Health and Welfare Benefit Plan for myself and/or my dependents listed above and agree to abide by the terms, provisions, and limitations as outlined by the Plan Sponsor in the issuance of the Summary Plan Description. I declare all statements contained in this form are true and correct and that no material information has been withheld or omitted. I understand that any misstatements or failure to report information that is material to my qualification and participation may be used as a basis for rescission of my participation and/or denial of payment of claims. I agree no benefits will be effective until the date indicated by *VEBA Trust Plan*.

I hereby authorize any licensed physician, medical practitioner, hospital, clinic, or other medical or medically related facility, the Veterans Administration, the Medical Information Bureau (MIB), or any other organization, institution, insurance or reinsurance company, to disclose and release any information in its possession about the medical history, mental or physical condition or treatments of myself and/or my dependents to *VEBA Trust Plan* or its designee. This authorization includes information about drug abuse, alcoholism, or mental health. I agree that a photographic copy of this authorization shall be as valid as the original and that said authorization shall be valid for the maximum length of time permitted by law. I understand that I have the right to copy this authorization upon request. I authorize my employer to deduct from earnings the contributions (if any) required towards benefits.

I understand that the plan is an employee health & welfare plan created under the Employee Retirement Income Security Act (ERISA) of 1974 and subject to the rules and regulations adopted by the United States Department of Labor and is not insurance subject to laws of the state in which I work or reside. This application will be part of the contract. Benefits are effective only after approval by *VEBA Trust Plan* or its designee and satisfaction of any probationary period.

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

**Beneficiary Information**

Beneficiary Name: \_\_\_\_\_ Relationship to Member: \_\_\_\_\_  
 Complete Address: \_\_\_\_\_ Birthdate of Beneficiary: \_\_\_\_\_  
 Phone: \_\_\_\_\_



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