## Basic Life Insurance Enrollment Form

### State of West Virginia Public Employee Insurance Agency

**Basic Life Enrollment Form**

Complete this form to enroll for Basic Life Insurance. Complete all sections of the form except “AGENCY”.

<table>
<thead>
<tr>
<th>Employee</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Legal Name</strong> (Last) (First) (MI)</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>County of Residence</td>
</tr>
<tr>
<td>City</td>
<td>State</td>
</tr>
<tr>
<td>Physical Address</td>
<td>Sex (Circle one)</td>
</tr>
<tr>
<td>City</td>
<td>State</td>
</tr>
</tbody>
</table>

PEIA no longer stores Beneficiary information. Please visit mybenefits.metlife.com or call MetLife at 1-888-466-8640 for assistance.

### Coverage

**Decreasing Term Benefit For Active Employees for:**

- Employee under age 65: $10,000
- Employee Age 65 but under 70: $6,500
- Employee Age 70 and over: $3,000

### Affidavit

**Tobacco Affidavit:** Please mark which members of the family use tobacco and sign the form. If none of the people enrolled on your PEIA coverage use tobacco, you will receive the discount on your health and Opt/Dep life insurance premiums. I acknowledge by signing the acceptance box below that PEIA or its agents have access to my medical records to check my tobacco use status.

- Who uses tobacco:  
  - [ ] Policyholder  
  - [ ] Dependent (spouse and/or children)  
  - [ ] No Tobacco Users within the last (6) months

### IRS Section 125

Do you wish to participate in the IRS Section 125 Premium Conversion Plan sponsored by PEIA, if available?  
- [ ] Yes  
- [ ] No

### Acceptance

- [ ] I hereby accept the Basic Life Insurance. I understand that PEIA may change the type or levels of benefits or the amount of contribution. I certify that the above information is true and correct and understand that providing false information on this form is illegal and those who provide false information may be prosecuted.  
- [ ] I do not wish to participate in PEIA Basic Life Insurance. I decline to participate in Basic Life Insurance. Employee’s Signature:  
  - Date: 

### Agency

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Account Number</th>
<th>Date of Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours worked Weekly</td>
<td>Effective Date of Coverage</td>
<td>Coverage Code</td>
</tr>
</tbody>
</table>

I hereby certify that to the best of my knowledge, the information contained herein is accurate. I further certify the employee is a permanent full-time employee of this agency who meets the minimum eligibility requirements for the Public Employee Insurance Plan.

Authorized Signature:  
- Date:  

6/2022
Basic Life Insurance Enrollment Form

**Agency Name:** Your agency name as it appears on your PEIA monthly billing.

**Account Number:** Your 9-digit agency account number as it appears on your billing.

**Date of Employment:** Date Employee was hired or the date he or she became benefit-eligible.

**Hours Worked Weekly:** Number of hours the employee works each week.

**Effective date of Coverage:** When completing the form, enter the first day of the month following date of enrollment (the date the employee signs the forms and returns it to you to elect the coverage), if it is within the month of hire and the two following calendar months. If an employee elects coverage outside this period, the employee must complete an evidence of insurability application; PEIA and Minnesota Life, the life insurance carrier, will determine the effective date of coverage. Minnesota Life will contact you when the medical underwriting decision has been made. Please see the Life section of the BCRM for further details. The employee must be actively at work for coverage to begin. If the employee is not actively at work due to illness or injury on the day coverage would have begun, then the effective date of coverage is delayed until the employee is actively at work.

**Coverage Code:** Mark with code LB01 for basic life.

**Index Code:** Choose the code from the appropriate charts on Page 2 and 3 that reflects the employee’s annual salary.

**Authorized Signature:** Your signature as the Benefit Coordinator.

**Date:** The date you sign the form. Forms should be signed immediately upon receipt from the policyholder.
Health Benefits Enrollment Form

State of West Virginia Public Employee Insurance Agency
Health Benefits Enrollment Form

Complete this form to enroll for health coverage. Complete all sections of the form except "AGENCY." This is a 2-page form. You must complete and submit both pages to enroll in the plan. If page 2 is not submitted with page 1, you will not be enrolled for health coverage.

Legal Name (Last) [First] [MI] [Generation Jr., Sr., etc.] Social Security Number

Mailing Address County of Residence Home Telephone

City State Zip Work Telephone

Physical Address Sex (Circle one)

City State Zip Date of Birth (mm/dd/yyyy)

Email Address

If you need more space than what is provided below, please use a blank sheet of paper and attach it to this form.

If spouse is currently insured by PEIA as a policyholder, please enter their Social Security Number

Legal Name [Last, First, MI, Generation] Address [If different from above] Relationship Sex Birth Date Social Security #

Coverage Selection (Select One) I am enrolling for:

- Employee Only
- Employee/Child(ren) Only
- Family

Please indicate the plan in which you are enrolling by checking the box to the left of the plan option you choose:

- PEIA PPB Plan A
- PEIA PPB Plan B
- PEIA PPB Plan C
- PEIA PPB Plan D
- The Health Plan HMO Plan A
- The Health Plan HMO Plan B
- The Health Plan POS

Proceed to page 2. This form is not valid if page 2 is not completed and submitted.

Health Enrollment form Page 1 June 2023
Health Benefits Enrollment Form – Page 2

Complete this form to enroll for health coverage. Complete all sections of the form except “AGENCY.”

**Tobacco Affidavit:** Please mark which members of the family use tobacco and sign the form. If none of the people enrolled on your PEIA coverage uses tobacco, you will receive the discount on your health and life insurance premiums. I acknowledge by signing the acceptance box below that PEIA or its agents have access to my medical records to check my tobacco use status.

Who uses tobacco:  
☐ Policyholder  
☐ Dependent (spouse and/or children)  
☐ No Tobacco Users within the last (6) months

**Spousal Surcharge Affidavit:** For active employees of state agencies, colleges, universities and county boards of education, if enrolling for family coverage, please mark the box that identifies your spouse’s insurance coverage status. If your spouse has employer-sponsored coverage available and remains on your PEIA coverage, you will be assessed a surcharge. Please mark the statement that applies to your spouse:

☐ My spouse does not have health coverage available through his/her employer; is not employed, has Medicare, Medicaid, or Tri-Care, or is retired. (No surcharge will be applied.)

☐ My spouse is employed by a PEIA-participating agency. (No surcharge will be applied.) Name of agency: ________________________________

☐ My spouse has health coverage available through his/her employer. (I understand that if my spouse is on my PEIA health coverage, the monthly premium surcharge will be applied to my premium.)

Check a box to indicate whether you accept or decline coverage, then sign the form.

☐ I hereby accept the group coverage I have indicated above. I understand that PEIA may change the type or levels of benefits or the amount of contribution. I certify that the above information is true and correct and understand that providing false information on this form is illegal and those who provide false information may be prosecuted. I hereby consent, for myself and my covered dependents, to the release to PEIA and to the plan I have selected, all of medical and prescription drug information needed to process claims, determine coverage, review utilization, investigate complaints, assess quality of care, evaluate plan performance or any other process involved in my treatment, payment of claims or health care operations.

☐ I do not wish to participate in any PEIA Health Coverage. I decline to participate in PEIA Health Coverage.

Employee’s Signature: ___________________________ Date: ________________

**Agency**

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Account Number</th>
<th>Date of Employment</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Hours worked Weekly</th>
<th>Effective Date of Coverage</th>
<th>Index Code</th>
<th>Coverage Code</th>
</tr>
</thead>
</table>

I hereby certify that to the best of my knowledge, the information contained herein is accurate. I further certify the employee is a permanent employee of this agency who meets the minimum eligibility requirements for the Public Employee Insurance Plan.

Authorized Signature: ___________________________ Date: ________________

Health Enrollment form  Page 2  June 2023
Health Benefits Enrollment Form

Agency Name: Your agency name as it appears on your PEIA monthly billing.

Account Number: Your 9-digit number found on the monthly billing invoice.

Date of Employment: Date Employee was hired or the date he/she became benefit-eligible.

Hours Worked Weekly: Number of hours the employee works each week.

Effective date of Coverage: When completing the form, enter the first day of the month following date of enrollment (the date the employee signs the forms to elect the coverage). Remember that the employee must be actively at work for coverage to begin. If the employee is not actively at work on the day coverage would have begun, then the effective date of coverage is delayed until the employee is actively at work. If paperwork is not sent in until the month after employment began, coverage may not begin until the first of the following month and there may be a lapse in coverage.

Index Code: Choose the code from the appropriate chart below to reflect the employee’s annual salary

Non-State Agencies Do Not fill in an Index Code.

For State Agencies, Colleges, Universities and County Boards of Education
For the PEIA PPB Plan A and ALL managed care coverages

<table>
<thead>
<tr>
<th>IDX</th>
<th>$0 - $30,400</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$30,401 - $40,400</td>
</tr>
<tr>
<td>2</td>
<td>$40,401 - $46,400</td>
</tr>
<tr>
<td>3</td>
<td>$46,401 - $52,400</td>
</tr>
<tr>
<td>4</td>
<td>$52,401 - $60,400</td>
</tr>
<tr>
<td>5</td>
<td>$60,401 - $72,900</td>
</tr>
<tr>
<td>6</td>
<td>$72,901 - $85,400</td>
</tr>
<tr>
<td>7</td>
<td>$85,401 - $110,400</td>
</tr>
<tr>
<td>8</td>
<td>$110,401 - $135,400</td>
</tr>
<tr>
<td>9</td>
<td>$135,401+</td>
</tr>
</tbody>
</table>

| 10   | |
|-----|
**Coverage Code:** Please use one of the codes below to indicate which plan the policyholder chose:

- HI01 PEIA PPB Plan A
- HI02 PEIA PPB Plan B
- HI03 PEIA PPB Plan C
- HI04 PEIA PPB Plan D
- HMHP - A The Health Plan HMO Plan A
- HMHP - B The Health Plan HMO Plan B
- HMHP – C The Health Plan HMO Plan C

Enter one of the following letters beside the Coverage Code to show the tier of coverage the employee has selected:

- **P** = Policyholder Only
- **F** = Policyholder, Spouse and Children
- **C** = Policyholder and Children Only
- **S** = Policyholder and Spouse Only (generates same premium as F)

**Please note:** There is no coverage code for Family with Employee Spouse (ESPS). It is coded as F or S, and the eligibility system assigns the ESPS premium. If the addition of health coverage creates an ESPS situation, PEIA needs to be aware of the IDX change if applicable so that it may be made at time of entry into the PEIA system. PEIA does not have access to salaries.

A completed Coverage code could look like this: **HI01 – P**, or like this: **HMHP-B-F**.

**Authorized Signature:** Your signature as the Benefit Coordinator.

**Date:** The date you sign the form. Forms should be signed immediately upon receipt from the policyholder.
Optional and Dependent Life Insurance Enrollment Form (OPT)
Optional and Dependent Life Insurance Enrollment Form (OPT)

Agency Name: Your agency name as it appears on your PEIA monthly billing.

Account Number: Your 9-digit agency account number as it appears on your billing.

Date of Employment: Date of full-time employment for the employee with your agency.

Hours Worked Weekly: Number of hours the employee works each week.

Effective Date of Coverage: When completing the form, enter the first day of the month following date of enrollment, (the date the employee signs the form and returns it to you to elect the coverage) if it is within the month of hire and the two following calendar months. If an employee elects coverage outside this period, the employee must complete an evidence of insurability application provided by the life insurance carrier. PEIA and Minnesota Life, the life insurance carrier, will determine the effective date of coverage. Minnesota Life will contact you when the medical underwriting decision has been made. Please see the Life section of the BCRM for further details. The employee must be actively at work for coverage (or an increase in the amount of coverage) to begin. If the employee is not actively at work on the day coverage would have begun, then the effective date of coverage is delayed until the employee is actively at work.

OPT Plan: Use the option code below based on the plan chosen by the employee.

<table>
<thead>
<tr>
<th>Active Employee Plan Number</th>
<th>Option Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan I</td>
<td>100</td>
</tr>
<tr>
<td>Plan II</td>
<td>200</td>
</tr>
<tr>
<td>Plan III</td>
<td>300</td>
</tr>
<tr>
<td>Plan IV</td>
<td>400</td>
</tr>
<tr>
<td>Plan V</td>
<td>500</td>
</tr>
<tr>
<td>Plan VI</td>
<td>600</td>
</tr>
<tr>
<td>Plan VII</td>
<td>650</td>
</tr>
<tr>
<td>Plan VIII</td>
<td>700</td>
</tr>
<tr>
<td>Plan IX</td>
<td>750</td>
</tr>
<tr>
<td>Plan X</td>
<td>800</td>
</tr>
<tr>
<td>Plan XI</td>
<td>900</td>
</tr>
<tr>
<td>Plan XII</td>
<td>950</td>
</tr>
<tr>
<td>Plan XIII</td>
<td>951</td>
</tr>
<tr>
<td>Plan XIV</td>
<td>952</td>
</tr>
<tr>
<td>Plan XV</td>
<td>953</td>
</tr>
<tr>
<td>Plan XVI</td>
<td>954</td>
</tr>
<tr>
<td>Plan XVII</td>
<td>955</td>
</tr>
<tr>
<td>Plan XVIII</td>
<td>956</td>
</tr>
</tbody>
</table>
If an employee chooses more than $100,000 of coverage, he or she will be required to provide Evidence of Insurability. Please see the Life section of the BCRM for further details.

**Dep. Plan**: Use the option code below based on the plan chosen by the employee.

<table>
<thead>
<tr>
<th>Dependent Plan Number</th>
<th>Option Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>200</td>
</tr>
<tr>
<td>3</td>
<td>300</td>
</tr>
<tr>
<td>4</td>
<td>400</td>
</tr>
<tr>
<td>5</td>
<td>500</td>
</tr>
</tbody>
</table>

Please note that if documentation is required for a dependent and cannot be submitted with the Optional and Dependent Life Insurance Enrollment form, the form on page 12 should accompany submission of the documentation to PEIA.

**Authorized Signature**: Your signature as the Benefit Coordinator.

**Date**: The date you signed the form. Forms should be signed immediately upon receipt from the policyholder.
# Change - In - Status Form

**State of West Virginia Public Employee Insurance Agency**

**Change-in-Status Form**

Complete this form to change your coverage. Complete all sections of the form except "AGENCY." Active employees return form to your benefit coordinator; retired employees mail this form to PEIA, 601 57TH St, SE, Suite 2, Charleston, WV 25304-2345 or fax to 1-877-233-4295. This is a 2-page form. You must complete and submit both pages to change your coverage.

<table>
<thead>
<tr>
<th>Full Legal Name (Last)</th>
<th>(First)</th>
<th>(MI)</th>
<th>Social Security #/Member ID #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailing Address</td>
<td>County of Residence</td>
<td>Home Telephone</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>State</td>
<td>Zip</td>
<td>Work Telephone</td>
</tr>
<tr>
<td>Physical Address</td>
<td>Sex [Circle one]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>State</td>
<td>Zip</td>
<td>Date of Birth (mm/dd/yy)</td>
</tr>
</tbody>
</table>

**Email Address:**

Please indicate the status change you are making:

- Name Change: □ Policyholder □ Dependent (Last) __________________________ (First) __________________________ (MI) __________
- Add Dependents to: □ Health □ Dependent Life □ Plan 1 □ Plan 2 □ Plan 3 □ Plan 4 □ Plan 5
- Complete dependent information below. If not in the initial enrollment period, evidence of insurability is required for life insurance.
- Remove Dependents from: □ Health □ Dependent Life: □ Plan 1 □ Plan 2 □ Plan 3 □ Plan 4 □ Plan 5
- Change in health coverage from Plan __________________________ to Plan __________________________
- Tobacco Status Change □ Other, Please Specify __________________________

For each qualifying event PEIA requires documentation. To add a dependent, PEIA requires documentation to substantiate legal dependency. Please see your Benefit Coordinator for questions about necessary documentation. The member's name, social security number and agency of employment must be written across the top of all documents submitted to PEIA.

**NOTE:** If you have Mountaineer Flexible Benefits, you must update that plan separately by completing an FBM C enrollment form. Please visit: [https://peia.wv.gov/Forms-Downloads/Pages/Mountaineer-Flexible-Benefits.aspx](https://peia.wv.gov/Forms-Downloads/Pages/Mountaineer-Flexible-Benefits.aspx) for more information.

If spouse is currently insured by PEIA as a policyholder, please enter their Social Security Number.

<table>
<thead>
<tr>
<th>Legal Name (Last, First, MI, Generation)</th>
<th>Address (if different from above)</th>
<th>Relationship</th>
<th>Sex</th>
<th>Birth Date</th>
<th>Social Security Number or Member ID Number</th>
</tr>
</thead>
</table>

June 2023
Change - In - Status Form
Change - In - Status Form

Agency Name: Your agency name as it appears on your PEIA monthly billing.

Account Number: Your 9-digit number found on the monthly billing invoice.

Effective Date of This Status Change: Typically, this date is the 1st day of the following month the employee has signed to elect the change. For example, if the Change in Status is dated Jan 28, 2017 by the employee, the effective date would be February 1, 2017.

In the case of a newborn or adopted child, the effective date may be retroactive. For **newborns** added within the month of birth and the two following calendar months effective date of coverage is the date of the child’s birth. For **adopted children** if added within the month of adoption or the following two calendar months, the effective date of coverage is retroactive to the date the child was placed in the home or the date the policyholder became financially responsible for the adopted child.

Index Code: Choose the code from the appropriate chart below to reflect the employee’s annual salary.

<table>
<thead>
<tr>
<th>IDX</th>
<th>For State Agencies, Colleges, Universities and County Boards of Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$0 - $30,400</td>
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</tr>
<tr>
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<td>$110,401 - $135,400</td>
</tr>
<tr>
<td>10</td>
<td>$135,401+</td>
</tr>
</tbody>
</table>

Authorized Signature: Your signature as the Benefit Coordinator.

Date: The date you signed the form. Forms should be signed immediately upon receipt from the policyholder.
Eligibility Documentation Memo

Remember that all changes require documentation, and no changes can be made outside Open Enrollment without a qualifying event. If you cannot submit the documentation with the Change in Status form, the form on this should accompany submission of documentation to PEIA.

<table>
<thead>
<tr>
<th>Divorce</th>
<th>Provide a copy of the divorce decree showing that the divorce is final.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marriage</td>
<td>Copy of valid marriage license or certificate</td>
</tr>
<tr>
<td>Birth of Child</td>
<td>Copy of child's birth certificate</td>
</tr>
<tr>
<td>Adoption</td>
<td>Copy of adoption papers</td>
</tr>
<tr>
<td>Adding coverage for a stepchild who resides with the policyholder</td>
<td>Copy of child's birth certificate.</td>
</tr>
<tr>
<td>Adding coverage for any other child who resides with the policyholder</td>
<td>Court-ordered guardianship papers.</td>
</tr>
<tr>
<td>Open Enrollment under spouse’s employer’s benefit plan</td>
<td>A copy of printed material showing open enrollment dates and the employer’s name.</td>
</tr>
<tr>
<td>Death of spouse or dependent</td>
<td>A copy of the death certificate.</td>
</tr>
<tr>
<td>Beginning of spouse’s employment</td>
<td>A letter from the spouse’s employer stating the hire date, effective date of insurance, what coverage was added, and what dependents are covered.</td>
</tr>
<tr>
<td>End of spouse’s employment</td>
<td>A letter from the spouse’s employer stating the termination or retirement date, what coverage was lost, and dependents that were covered.</td>
</tr>
<tr>
<td>Unpaid leave of absence by employee or spouse</td>
<td>A letter from your or your spouse’s personal office stating the date that you or your spouse went on unpaid leave or returned from unpaid leave.</td>
</tr>
<tr>
<td>Significant Change in Health Coverage Attributable to Spouse’s or Dependent’s Employment</td>
<td>A letter from the spouse’s insurance carrier indicating the change in insurance coverage, the effective date of that change and dependents covered.</td>
</tr>
<tr>
<td>Change from full-time to part-time employment or vice versa for employee or spouse</td>
<td>A letter from your or your spouse’s employer stating the previous hours worked and the new hours worked and the effective date of the change.</td>
</tr>
</tbody>
</table>
Change - In - Address Form

This form is not specifically for use by Benefit Coordinators and does not require the Benefit Coordinator’s signature. We are including it in this book for your convenience and reference.
Policyholder Termination of Coverage Form

State of West Virginia Public Employee Insurance Agency
Policyholder Termination of Coverage Form

Complete this form to terminate health/life coverage. Complete all sections of the form except "AGENCY."

Full Legal Name (Last) (First) (Mi) (Generation: Jr., Sr., etc.) Social Security Number
Mailing Address County of Residence Home Telephone
City State Zip Work Telephone
Physical Address Sex (Circle one)
City State Zip M F Date of Birth (mm/dd/yy)

If your spouse is currently insured by PEIA as a policyholder, please provide the Social Security Number.

*** Participants cannot voluntarily terminate a benefit without a qualifying event. If you are requesting this action outside of open enrollment period, please state the qualifying event and attach documentation to support the event. Please refer to the Summary Plan Description for further details and a list of qualifying events.

- Resignation (B.C. If transferring to another PEIA insured agency, please use the online transfer function in Manage My Benefits)
- Terminated for Misconduct (If an Administrative appeal is being instituted, please complete the Administrative Appeal section of this form)
- Terminated involuntarily or by reduction in work force.
- I do not accept the (3) additional months of extended benefits.
- Voluntarily cancel all coverage. Re-enrollment restrictions may apply***
- (To cancel health insurance only, use a Change in Status form)
- Retirement
- Cancellation of Employee Basic Life Insurance***
- Cancellation of Employee Optional Life Insurance***
- Cancellation of Dependent Optional Life Insurance***
- Deceased (Please enter the date of death)
- Surviving Dependent Remarriage (Please enter the date of Marriage)
- Termination (If policyholder is unavailable for signature, Form must be signed by B.C. and by another staff member of the agency)
- Affordable Care Act
- Other (Please explain)

Required Policyholder Signature: Date:

In the case of a termination for misconduct, you may have the right to an administrative appeal. If the administrative appeal is to be instituted, with your employer’s approval, you may continue to pay your employee’s share of the monthly premium. If you lose the appeal, and have elected to continue your coverage for these additional months, you will be required to reimburse the total premium for the months during which you have continued your coverage.

Policyholder Signature: Date:

Under federal COBRA law, PEIA and the managed care plans must offer continued coverage to qualified policyholders or dependents under certain circumstances. You will be sent a notification with the necessary applications by UMR, PEIA’s COBRA administrator. You will have a limited amount of time to elect continuation of coverage. COBRA premiums include both the employer and employee share of the premium, as well as an administrative fee, so they are higher than premiums paid by active employees. The premiums are printed in the Shopper’s Guide each year. For further information, you may contact UMR at 1-888-440-7342.

Agency Name Account Number Current Coverage Code
Date Off Payroll Effective Date of Termination

I hereby certify to the best of my knowledge, the information contained herein is accurate.

Benefit Coordinator Signature: Date:

Agency Authorized Signature: Title:

Date: Signed

March 2019
Policyholder Termination of Coverage Form

**Account Name:** Your agency name as it appears on your PEIA monthly billing.

**Account Number:** Your 9-digit number found on the monthly billing invoice

**Current Coverage Code:** Indicate the Code of Coverage under which the employee was last covered.

- HI01 PEIA PPB Plan A
- HI02 PEIA PPB Plan B
- HI03 PEIA PPB Plan C
- H104 PEIA PPB Plan D
- HMHP - A The Health Plan HMO Plan A
- HMHP - B The Health Plan HMO Plan B
- LB01 Life Insurance Only

**Date Off Payroll:** The last day the employee is on payroll.

**Effective Date of Termination:** This date should be the last day of the calendar month in which the employee’s coverage ends. If an employee went off payroll January 1st, the effective date of termination would be January 31st. In the event an employee’s last paycheck would not cover the PEIA health premium, and the employee chooses not to pay the premium, please indicate the last month for which the employee paid premiums. In the case where the dates are not within the same month, please provide details in the “other please explain” section.

**Authorized Signature:** Your signature as the Benefit Coordinator.

**Agency Authorized Signature:** If the Policyholder is unavailable to sign the Termination form, PEIA requires a second authorized signature and title to confirm termination of the employee.

**Date:** The date you signed the form. Forms should be signed immediately upon receipt from the policyholder.
Retirement Health Benefits and Basic Life Enrollment Form

State of West Virginia Public Employee Insurance Agency
Retiree Health and Life Insurance Enrollment Form

Complete this form to enroll for Health and/or Basic Life coverage. Complete all sections of the form except "AGENCY".

Please read and follow the instructions included with this form when completing. Use this form to enroll for health and basic life insurance coverage as a retiree. You must complete this form to continue your benefits as a retiree. This is a two-page form. You must submit both pages for your enrollment to be valid. Incomplete forms will be returned and may delay your enrollment. Complete all sections of the form except the last "Agency" portion. Return the completed forms to your HR department.

Legal Name (Last) (First) (Mi) (Generation: Jr., Sr., etc.) Social Security Number

Mailing Address County of Residence Medicare ID Number (HIC)

City State Zip Home Telephone (  )

Physical Address Sex (Circle one) M F

City State Zip Date of Birth (mm/dd/yy)

Provide the date when you were or will be Medicare Eligible. Please also provide a copy of your Medicare ID card now or when you are Medicare eligible.

Provide the name of your last employer and your last day worked

Complete the following information ONLY for dependents to be covered under your plan.

Legal Name (Last, First, Mi, Generation) Address (if different from above) Relationship Sex Birth Date Social Security Number Other Health Insurance (Plan Name)

Coverage Selection (Select One) I am enrolling for:

- Policyholder Only Health and Life
- Print the name of the plan you choose here: ____________________________
- Family Health and Life
- Print the name of the plan you choose here: ____________________________
- Life Insurance Only (No Health Benefits)
- Life Insurance Only (Health Benefits under spouse’s PEA plan)
- Health Insurance Only. (No Life Insurance Benefits) Print the name of the plan you choose here: ____________________________

Earned Extended Benefits

Sick and/or Annual leave and Faculty Credits

I choose to use my credits to:

- Extend my employer-paid insurance coverage. Please be aware that if the policyholder dies while using this benefit, survivors may continue coverage, but may not use any remaining accrued leave.

- Increase my annuity amount.

(Complete proper forms from CPRB)

Please be aware that if you submit conflicting documents regarding the use of your leave credits, the document you file with the CPRB will take precedence.

This form is continued on page 2. You must complete and return both pages of the form for it to be valid.

PLEASE Continue.
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Complete this form to enroll for Health and/or Basic Life coverage. Complete all sections of the form except "AGENCY"

Please read and follow the instructions included with this form when completing. Use this form to enroll for health and basic life insurance coverage as a retiree. You must complete this form to continue your benefits as a retiree. This is a two-page form. You must submit both pages for your enrollment to be valid. Incomplete forms will be returned and may delay your enrollment. Complete all sections of the form except the last "Agency" portion. Return the completed forms to your HR department.

PEIA no longer stores Beneficiary information. Please visit mybenefits.metlife.com or call MetLife at 1-888-466-8640 for assistance.

Tobacco Affidavit: Please mark which members of the family use tobacco and sign the form. If none of the people enrolled on your PEIA coverage uses tobacco, you will receive the discount on your health and life insurance premiums. I acknowledge by signing the acceptance box below that PEIA or its agents have access to my medical records to check my tobacco use status.

Who uses tobacco: □ Policyholder □ Dependent (spouse and/or children) □ No Tobacco Users within the last (6) months

☐ I hereby accept the group coverage I have indicated above. I understand that PEIA may change the type or levels of benefits or the amount of contribution. I certify that the above information is true and correct and understand that providing false information on this form is illegal and those who provide false information may be prosecuted. I hereby consent, for myself and my covered dependents, to the release to PEIA and to the plan I have selected, all of medical and prescription drug information needed to process claims, determine coverage, review utilization, investigate complaints, assess quality of care, evaluate plan performance or any other process involved in my treatment, payment of claims or health care operations.

☐ I do not wish to participate in ANY PEIA Health Coverage or Basic Life Coverage. I decline to participate in ANY PEIA Coverage at this time.
Signature: ____________________________ Date: ____________________________

Agency Name ______________________________________________________________________________________________________________________________________
Agency Account Number __________________________________________________________________________________________________________________________________
Hire Date __________________________________________________________________________________________________________________________________
Last date of active Employment __________________________________________________________________________________________________________________________________
Effective Date of Retirement __________________________________________________________________________________________________________________________________
Effective date of Retiree Insurance Coverage __________________________________________________________________________________________________________________________________
Number of Days of accrued sick and annual leave for which the employee was not paid when employment ceased.
Number of months of earned extended insurance coverage (2 days = 1 month single; 3 days = 1 moth family coverage) Partial months are not allowed.
Total WV State Government credited years of service:
Higher Education Faculty Only: Total years of extended coverage in months:
3 and 1/3 years = 1 year of single coverage; 5 years’ service = 1 year family coverage
Member Retirement from: □ TIAA-CREF □ TRS □ TDC □ PERS □ TROOPERS
I hereby certify that to the best of my knowledge, the information contained herein is accurate. I further certify the employee meets the minimum eligibility requirements for the Public Employee Insurance Plan.
Authorized Signature: ____________________________ Date: ____________________________

June 2022 4
Retirement Health Benefits and Basic Life Insurance Enrollment Form Instructions

**Retiree:** Complete all demographic information. Use your full **LEGAL** name. The ‘Generation’ area provides a space for men to indicate family generation indicators such as Jr., Sr., II, III etc.

The Medicare ID Number can be found on your red, white, and blue Medicare card. The number is required for continued coverage when you reach Medicare age. If you are not yet eligible for Medicare, please send PEIA a copy of your Medicare card when you enroll for Medicare coverage.

PEIA needs information about Medicare coverage for you. Your premium decreases when you are retired and have Medicare.

Please provide the date when you were or will become eligible for Medicare. **When you become eligible for Medicare it is important that you enroll for both Medicare parts A and B.** Please see your summary plan description for more information.

PEIA needs information about your last employer prior to retirement and the last day worked (or will work) for that employer.

**Dependent Information:** Fill in any dependents that are to be covered under your health insurance plan. Please complete each box and if they are Medicare eligible, we will need a copy of their Medicare card. Please see the documentation chart in the Summary Plan Description to know what documentation is needed for proof of legal dependency for any dependents you may be adding.

**Basic Life Beneficiary(s):** PEIA no longer stores Beneficiary information. Please visit mybenefits.metlife.com or call MetLife at 1-888-466-8640 for assistance.

**Coverage Selection:** Please indicate the type of coverage you choose to have in retirement. Remember that if you are to continue your health care coverage into retirement, you must remain in the health care plan you were in as an active employee through the end of the plan year (June30), unless you were in a managed care plan and will be Medicare eligible when you retire. Please be sure to fully specify the plan you want, including the plan name and any option, such as PEIA PPB Plan A or the Health Plan B. For life insurance, on this form you can continue your Basic Life insurance. If you wish to continue Optional and/or dependent coverage, you must complete the Retiree Optional Life Insurance form.

**Earned Extended Benefits:** If you have sick and/or annual leave credits, you must specify how you want to use those credits. You may use them to extend your employer-paid coverage under PEIA or to increase your annuity from CPRB. For details, please see your Summary Plan Description. If you were hired after July 1, 2001, you cannot use sick/annual leave credits to extend employer-paid insurance coverage.
Retirement Health Benefits and Basic Life Enrollment Form

State of West Virginia Public Employee Insurance Agency
Retiree Health and Life Insurance Enrollment Form
Complete this form to enroll for Health and/or Basic Life coverage. Complete all sections of the form except “AGENCY”

Affidavit: PEIA offers discounts to tobacco-free plan members for both health and optional life insurance. You must complete the affidavit to qualify for the discount.

Acceptance: When you have made your selections on this form, you must sign and date the “Acceptance” box and sign and date the bottom of the acceptance box. If you do not wish to enroll for health or life insurance coverage as a retiree, you must mark the appropriate “Declination” box and sign and date below it.

What next: When your form is completed to this point, please return it to the Benefit Coordinator at your place of employment. Your Benefit Coordinator in your HR department will complete the agency portion of the form and submit it for processing.
Retirement Health Benefits and Basic Life Enrollment Form

**Agency Name:** Your agency name as it appears on your PEIA monthly billing.

**Agency Account Number:** Your 9-digit number found on the monthly billing invoice

**Hire Date:** Enter the date in month, day and year policyholder was hired.

**Last date of Active Employment:** Date employee was last actively on payroll

**Effective Date of Retirement:** Date the employee retires

**Effective Date of Retiree Insurance Coverage:** First day of the month following the date of retirement

**Number of days accrued, sick and annual:** Enter the total number of days to be used towards payment of premiums.

**Number of Months earned extended coverage:** Enter the total number of months earned for coverage of premiums. 2 days = 1 month of single coverage and 3 days = 1 month of family coverage. Partial months are not allowed.

**WV State Credited years of Service:** Enter the correct number of years without lapse in service.

**Higher Ed years of extended coverage:** Enter the correct number of months of extended coverage. 3 and 1/3 years = 1 year of single coverage and 5 years of service = 1 year of family coverage

**Member Retirement from:** Mark the correct box if any apply.

**Authorized Signature:** Your signature as the Benefit Coordinator

**Date:** The date you signed the form. Forms should be signed immediately upon receipt from the policyholder.
Retirement Optional/Dependent Life Enrollment Form

<table>
<thead>
<tr>
<th>Legal Name (Last)</th>
<th>(First)</th>
<th>(MI)</th>
<th>(Generation: Jr., Sr., etc.)</th>
<th>Social Security Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailing Address</td>
<td>County of Residence</td>
<td>Home Telephone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>State</td>
<td>Zip</td>
<td>Sex (Circle one)</td>
<td>M</td>
</tr>
<tr>
<td>Date of Birth (mm/dd/yy)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You Must be enrolled with BASIC LIFE to enroll in Optional and/or Dependent Life. If you have not enrolled for Basic Life, please fill out a Retiree Basic Life and Health Enrollment Form to enroll in Basic Life prior to submitting this form.

Optional Life Insurance: If you have enrolled in basic Life insurance you may choose to enroll for optional life for yourself. Your coverage is based on your selection and your age on the effective date of coverage. If you need additional space please use a blank sheet of paper and attach it.

<table>
<thead>
<tr>
<th>Employee’s Age</th>
<th>Plan 1</th>
<th>Plan 2</th>
<th>Plan 3</th>
<th>Plan 4</th>
<th>Plan 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under Age 65</td>
<td>$5,000</td>
<td>$10,000</td>
<td>$15,000</td>
<td>$20,000</td>
<td>$30,000</td>
</tr>
<tr>
<td>Age 65 to 69</td>
<td>3,250</td>
<td>6,500</td>
<td>9,750</td>
<td>13,000</td>
<td>19,500</td>
</tr>
<tr>
<td>Age 70 and above</td>
<td>2,500</td>
<td>5,000</td>
<td>7,500</td>
<td>10,000</td>
<td>15,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee’s Age</th>
<th>Plan 6</th>
<th>Plan 7</th>
<th>Plan 8</th>
<th>Plan 9</th>
<th>Plan 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under Age 65</td>
<td>$40,000</td>
<td>$50,000</td>
<td>$75,000</td>
<td>$100,000</td>
<td>$150,000</td>
</tr>
<tr>
<td>Age 65 to 69</td>
<td>26,000</td>
<td>32,500</td>
<td>48,750</td>
<td>65,000</td>
<td>97,500</td>
</tr>
<tr>
<td>Age 70 and above</td>
<td>20,000</td>
<td>25,000</td>
<td>37,500</td>
<td>50,000</td>
<td>75,000</td>
</tr>
</tbody>
</table>

PEIA no longer stores Beneficiary information. Please visit mybenefits.metlife.com or call MetLife at 1-888-466-8640 for assistance.

This form is continued. You must complete and return both pages of the form for it to be valid. Please Continue.

Revised June 2022
Retirement Optional/Dependent Life Enrollment Form

<table>
<thead>
<tr>
<th>Plan 1</th>
<th>Plan 2</th>
<th>Plan 3</th>
<th>Plan 4</th>
<th>Plan 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5,000 for your spouse</td>
<td>$10,000 for your spouse</td>
<td>$15,000 for your spouse</td>
<td>$20,000 for your spouse</td>
<td>$40,000 for your spouse</td>
</tr>
<tr>
<td>$2,000 for each child</td>
<td>$4,000 for each child</td>
<td>$7,500 for each child</td>
<td>$10,000 for each child</td>
<td>$15,000 for each child</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dependent Legal Name (Last, First, Ml, Generation)</th>
<th>Relationship to Insured</th>
<th>Social Security Number</th>
<th>Date of Birth (mm/dd/yy)</th>
</tr>
</thead>
</table>

Tobacco Affidavit: Please mark which members of the family use tobacco and sign the form. If none of the people enrolled on your PEIA coverage uses tobacco, you will receive the discount on your health and life insurance premiums. I acknowledge by signing the acceptance box below that PEIA or its agents have access to my medical records to check my tobacco use status.

Who uses tobacco:  
- [ ] Policyholder
- [ ] Dependent (spouse and/or children)
- [ ] No Tobacco Users within the last (6) months

I am enrolling in  
- [ ] Optional Life
- [ ] Dependent Life

- [ ] The Benefits have been explained to me and I hereby decline to participate.
- [ ] I hereby accept the Life Insurance. I understand that PEIA may change the type or levels of benefits or the amount of contribution. I certify that the above information is true and correct and understand that providing false information on this form is illegal and those who provide false information may be prosecuted.

Employee’s Signature:  
Date:  

Agency Name  
Hire Date  
Last Date of Active Employment

Account Number  
Effective Date of Retirement  
Effective Date of Retiree Coverage

I hereby certify that to the best of my knowledge, the information contained herein is accurate. I further certify the employee is a permanent full-time employee of this agency who meets the minimum eligibility requirements for the Public Employee Insurance Plan.

Authorized Signature:  
Date:  

Revised June 2022
Retirement Optional/Dependent Life Enrollment Form

**Agency Name:** Your agency name as it appears on your PEIA monthly billing.

**Agency Account Number:** Your 9-digit number found on the monthly billing invoice.

**Hire Date:** Enter the date in month, day and year policyholder was hired.

**Last date of Active Employment:** Date employee was last actively on payroll.

**Effective Date of Retirement:** Date the employee retires.

**Effective Date of Retiree Insurance Coverage:** First day of the month following the date of retirement.

**OPT Plan:** Use the option code below based on the plan chosen by the employee.

<table>
<thead>
<tr>
<th>Active Employee Plan Number</th>
<th>Option Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan I</td>
<td>100</td>
</tr>
<tr>
<td>Plan II</td>
<td>200</td>
</tr>
<tr>
<td>Plan III</td>
<td>300</td>
</tr>
<tr>
<td>Plan IV</td>
<td>400</td>
</tr>
<tr>
<td>Plan V</td>
<td>500</td>
</tr>
<tr>
<td>Plan VI</td>
<td>600</td>
</tr>
<tr>
<td>Plan VII</td>
<td>650</td>
</tr>
<tr>
<td>Plan VIII</td>
<td>700</td>
</tr>
<tr>
<td>Plan IX</td>
<td>750</td>
</tr>
<tr>
<td>Plan X</td>
<td>800</td>
</tr>
</tbody>
</table>

If an employee chooses more than $100,000 of coverage, he or she will be required to provide Evidence of Insurability. Please see the Life section of the BCRM for further details.

**Dep. Plan:** Use the option code below based on the plan chosen by the employee.

<table>
<thead>
<tr>
<th>Dependent Plan Number</th>
<th>Option Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>200</td>
</tr>
<tr>
<td>3</td>
<td>300</td>
</tr>
<tr>
<td>4</td>
<td>400</td>
</tr>
<tr>
<td>5</td>
<td>500</td>
</tr>
</tbody>
</table>

Please note that if documentation is required for a dependent and cannot be submitted with the Optional and Dependent Life Insurance Enrollment form, the form on page 15 should accompany submission of the documentation to PEIA.

**Authorized Signature:** Your signature as the Benefit Coordinator.

**Date:** The date you signed the form. Forms should be signed immediately upon receipt from the policyholder.
Surviving Dependent Enrollment Form

This form is not specifically for use by Benefit Coordinators and does not require the Benefit Coordinator’s signature. We are including it in this book for your convenience and reference.
Authorization to Remove WCC/BC

Please remove the following individual as an active PEIA:

- Benefit Coordinator
- Web Contributions Coordinator

Employee Name: ____________________________________________
Employee E-Mail Address: __________________________________
Agency Name: _____________________________________________
Agency Account Number: ____________________________________
Effective Date of Removal: ________________________________

Authorized by (print name): __________________________________
Title: __________________________________ Phone: __________
Signature: __________________________________ Date: ___________
Authorization to Remove WCC/BC

It is important to *immediately* remove access of previous WCCs and BCs when they leave your agency.

**Mark appropriate circles:** Mark which roles from which they need access to be removed.

**Employee Name:** Enter the employee’s name

**Employee Email Address:** Enter the employee’s email address

**Agency Name:** Enter the name of the Agency

**Effective Date of Removal:** Enter the effective date of removal from the role(s).

**Agency Account Number:** Enter your 9-digit number found on the monthly billing invoice.

**Authorized By:** Write your printed name.

**Title:** Enter your title.

**Telephone Number:** Enter your telephone number at your agency.

**Signature:** Sign your signature.

**Date:** The date you sign the form. Forms should be signed immediately and emailed or faxed to PEIA.