



Big Sky Rx Program Application

Please fill out only one application, but answer the questions separately for you and your spouse if you are married and living together. Please print. Use capital letters. It is **IMPORTANT** that you fill in all sections. Missing information will cause delays.

- SEND IN YOUR:**
- ✓ Big Sky Rx Application
 - ✓ Copy of Enrollment Information (Medicare Prescription Drug Plan)
 - ✓ Copy of Your Extra Help Determination (if applicable)

SEND TO: Big Sky Rx Program
PO Box 202915
Helena, MT 59620-2915

CONTACT US AT: 1-866-369-1233
1-406-444-1233
1-406-444-3846
711
Bigskyrx@mt.gov
www.bigskyrx.mt.gov

Toll Free from In State
Out of State and Helena
Fax
MT Relay Service
Email
Web Site

ADA - Persons with disabilities who need an alternative accessible format of this information, or who require some other reasonable accommodations in order to participate in Big Sky Rx, should contact us at the numbers above.

1. APPLICANT:

First Name

Middle Initial

Last Name

Suffix

Are you applying for Big Sky Rx? Yes No

Social Security Number: - -

Medicare Number:

Medicare Effective Date: Month Year

Date of Birth: Month Day Year Gender:

Male Female

2. SPOUSE: (if married and living together):

First Name

Middle Initial

Last Name

Suffix

Are you applying for Big Sky Rx? Yes No

Social Security Number: - -

Medicare Number:

Medicare Effective Date: Month Year

Date of Birth: Month Day Year Gender:

Male Female

3. ADDRESS:

Mailing Address

Street or P.O. Box Number

City

Zip Code

Home Phone Number - -

Area Code

Prefix

Number

4. ALTERNATE ADDRESS: If you reside elsewhere during the year.

Dates: From _____ to _____

Mailing Address

Street or P.O. Box Number

City

Zip Code

Phone Number - -

Area Code

Prefix

Number

5. ADDITIONAL CONTACT (optional): If you prefer we contact someone else if we have additional questions, please provide his or her information. By listing this person it gives us your permission to share your Big Sky Rx program information with them.

First Name:

Last Name:

Mailing Address:

Street or P.O. Box Number

City

Zip Code

Home Phone Number - -

Area Code

Prefix

Number

Do you want us to send notices and follow-up information to:

Applicant Only Contact Only Both Applicant AND Contact

6. ARE YOU A MEMBER OF A TRIBE? (Optional)

Applicant No Yes Tribe Name _____

Spouse No Yes Tribe Name _____

7. In the past 12 months, have you or your spouse received **MEDICAID** benefits from Montana or any other state?

No Yes, State _____

8. **ADDITIONAL FAMILY MEMBERS:** How many relatives live with you and/or your spouse and depend on you or your spouse to provide at least one-half of their financial support. Relatives include anyone related to you by blood, marriage or adoption. **Do not include yourself or your spouse in this number. Check only one box.**

0 1 2 3 4 5 6 7 8 9

9. **MONTHLY FAMILY INCOME:** If you and/or your spouse, (if married and living together) receive income from any of the sources listed below, please enter the **total MONTHLY GROSS income for each per-son (total before taxes)**. If the amount changes from month to month, enter the average monthly income for the past year for each type. Do not list income tax refunds, wages and self-employment, interest income, public assistance, medical reimbursements, or foster care payments here.

GROSS MONTHLY

Social Security Benefits	<input type="checkbox"/> None	\$
Railroad Retirement	<input type="checkbox"/> None	\$
Veterans Benefits	<input type="checkbox"/> None	\$
Net Rental Income	<input type="checkbox"/> None	\$

10. **OTHER UNEARNED INCOME:** Please list the **MONTHLY** amount in the space(s) below. Examples include: Public or Private Pensions, Annuities, Worker's Compensation, Dividends, Interest, Alimony, Income from a Trust, Inheritances.

MONTHLY

Source of Income:	<input type="checkbox"/> None	\$
Source of Income:	<input type="checkbox"/> None	\$

11. **EARNED/WAGES INCOMES:** What do you expect to earn in wages before taxes **this year**? Include wages, tips, net earnings from self-employment, royalties, and honoraria. **If none, skip to question 12. DO NOT list income reported in questions 9 or 10.**

YEARLY

Applicant	<input type="checkbox"/> None	\$
Your Spouse:	<input type="checkbox"/> None	\$

WORK RELATED DISABILITY OR BLINDNESS EXPENSE: Do you and/or your spouse, (if married and living together) have to pay for things that enable you to work for which you are not reimbursed?

Legally Disabled	Applicant	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>
	Spouse	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>
Legally Blind	Applicant	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>
	Spouse	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>

12. FAMILY ASSETS: This information is used to determine potential eligibility for the Federal program, **Social Security Extra Help**. Extra Help can pay for Medicare prescription drug plan co-payments, deductibles, and premiums. We will notify you if your income and assets indicate you must apply. **Assets do not disqualify you for the Big Sky Rx Program.**

Single	<input type="checkbox"/> Less than \$14,100	<input type="checkbox"/> More than \$14,100
Married	<input type="checkbox"/> Less than \$28,150	<input type="checkbox"/> More than \$28,150

Assets are defined:

Total value of any financial institution accounts (including checking, savings, certificates of deposit, retirement accounts, such as Individual Retirement Accounts (IRA), 401(k) accounts and similar items), stocks, bonds, savings bonds, mutual fund shares, or other similar investments, cash, and any other real estate other than your home and the property on which it is located, investments and real estate (other than your home). Include the things you own by yourself, with your spouse or with someone else. **Do not include your home, vehicles, burial plots or personal possessions.**

13. HAVE YOU APPLIED FOR SOCIAL SECURITY EXTRA HELP?

No Yes

If Yes, what was your determination? Check only one box and include a copy of your determination.

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Still In Progress	Denied	25%	50%	75%	100%
Spouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Still In Progress	Denied	25%	50%	75%	100%

14. MEDICARE PRESCRIPTION DRUG PLAN:

Have you enrolled with a Medicare prescription drug plan?

What is your Medicare drug coverage plan name option or choice?

		Plan Name	Premium Amt	Effective Date
No	<input type="checkbox"/>	Applicant		
No	<input type="checkbox"/>	Spouse		

If you have not yet signed up for a Medicare prescription drug plan, please continue to fill out this application and mail it to Big Sky Rx. When we receive your prescription drug plan information, we will enroll you into Big Sky Rx, if you qualify.

15. PAYMENT METHOD:

Self <input type="checkbox"/>	Your Spouse <input type="checkbox"/> (if living together and applying for Big Sky Rx.)	Pay Plan - Check here if you want Big Sky Rx to pay your premium directly to your prescription drug plan. If you reside elsewhere during the year, check this payment method. Note: Some plans cannot accept direct payment from Big Sky Rx. Big Sky Rx will notify you if another payment method choice is needed. DO NOT check if your Part D premium is taken out of you Social Security check or checking account.
---	---	--

If your Part D premium is taken out of your social security check or checking account, select one of the options below:

Self <input type="checkbox"/>	Your Spouse <input type="checkbox"/> (if living together and applying for Big Sky Rx.)	Direct Deposit - Check here if you want the monthly premium amount from Big Sky Rx directly deposited to your bank account. Big Sky Rx will send you the direct deposit forms to complete. You are responsible to pay your premium to your plan.
<input type="checkbox"/>	<input type="checkbox"/>	Check - Check here if you want Big Sky Rx to send the check to your home address listed on this application. You are responsible to pay your premium to your plan.

NOTE: Your enrollment starts the first day of the month following receipt of all requested information.

16. MY SIGNATURE ON THIS APPLICATION INDICATES: I understand that by submitting this application, I am declaring under penalty of perjury that I have examined all the information on this form and it is true and correct to the best of my knowledge. I understand that anyone who knowingly gives a false or misleading statement about a material fact in this information, or causes someone else to do so, commits a crime. I know I must provide any documentation related to this application if requested. Failure to do so will result in ineligibility or closure of benefits. I understand that the Big Sky Rx Program may check my statements and compare my records from Federal, State, and local government agencies, with my application to make sure the determination is correct. By submitting this application, I am authorizing Big Sky Rx to obtain and disclose information related to my income, resources, and assets, foreign and domestic, consistent with applicable privacy laws. This information may include, but is not limited to, information about my wages, account balances, investments, insurance policies, benefits, and pensions. If I knowingly give false information to enroll in Big Sky Rx, I understand that I must reimburse Big Sky Rx for any costs incurred. If an audit proves I am over income, I know I will be disenrolled as of the following month from Big Sky Rx. **If I change my address, am no longer a Montana resident, change Medicare Prescription Drug Plans or have a change in Extra Help (if applicable), I must report the change to Big Sky Rx within 20 business days. ALL APPLICANTS MUST SIGN.**

Signature of Applicant _____

Date _____

Signature of Spouse _____
(if applying for Big Sky Rx)

Date _____

Signature of Representative _____
(if applicable)

Date _____

Confidentiality Statement

Your name, address, social security number and/or other identifying information provided on this application is confidential and will only be used by Big Sky Rx for the sole purpose of the administration of this program.

To apply with Social Security Extra Help on line, go to: <https://secure.ssa.gov/i1020/start>

DIRECT DEPOSIT SIGN-UP FORM

DIRECTIONS

- To sign up for Direct Deposit, the payee is to read the back of this form and fill in the information requested in Sections 1 and 2. Then take or mail this form to the financial institution. The financial institution will verify the information in Sections 1 and 2, and will complete Section 3. The completed form will be returned to the Government agency identified below.
- A separate form must be completed for each type of payment to be sent by Direct Deposit.
- The claim number and type of payment are printed on Government checks. (See the sample check on the back of this form.) This information is also stated on beneficiary/annuitant award letters and other documents from the Government agency.
- Payees must keep the Government agency informed of any address changes in order to receive important information about benefits and to remain qualified for payments.

SECTION 1 (TO BE COMPLETED BY PAYEE)

A NAME OF PAYEE (<i>last, first, middle initial</i>)		D TYPE OF DEPOSITOR ACCOUNT <input type="checkbox"/> CHECKING <input type="checkbox"/> SAVINGS	
ADDRESS (<i>street, route, P.O. Box, APO/FPO</i>)		E DEPOSITOR ACCOUNT NUMBER	
CITY	STATE	ZIP	CODE
TELEPHONE NUMBER		F TYPE OF PAYMENT (<i>Check only one</i>)	
AREA CODE		<input type="checkbox"/> Social Security <input type="checkbox"/> Fed. Salary/Mil. Civilian Pay <input type="checkbox"/> Supplemental Security Income <input type="checkbox"/> Mil. Active _____ <input type="checkbox"/> Railroad Retirement <input type="checkbox"/> Mil. Retire. _____ <input type="checkbox"/> Civil Service Retirement (OPM) <input type="checkbox"/> Mil. Survivor _____ <input type="checkbox"/> VA Compensation or Pension <input type="checkbox"/> Other _____ (<i>specify</i>)	
B NAME OF PERSON(S) ENTITLED TO PAYMENT		G THIS BOX FOR ALLOTMENT OF PAYMENT ONLY (<i>If applicable</i>)	
Prefix Suffix		TYPE	AMOUNT
C CLAIM OR PAYROLL ID NUMBER		JOINT ACCOUNT HOLDERS' CERTIFICATION (<i>optional</i>)	
PAYEE/JOINT PAYEE CERTIFICATION I certify that I am entitled to the payment identified above, and that I have read and understood the back of this form. In signing this form, I authorize my payment to be sent to the financial institution named below to be deposited to the designated account.		I certify that I have read and understood the back of this form, including the SPECIAL NOTICE TO JOINT ACCOUNT HOLDERS.	
SIGNATURE	DATE	SIGNATURE	DATE
SIGNATURE	DATE	SIGNATURE	DATE

SECTION 2 (TO BE COMPLETED BY PAYEE OR FINANCIAL INSTITUTION)

GOVERNMENT AGENCY NAME	GOVERNMENT AGENCY ADDRESS
------------------------	---------------------------

SECTION 3 (TO BE COMPLETED BY FINANCIAL INSTITUTION)

NAME AND ADDRESS OF FINANCIAL INSTITUTION		ROUTING NUMBER		CHECK DIGIT
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		<input type="text"/>
		DEPOSITOR ACCOUNT TITLE		
FINANCIAL INSTITUTION CERTIFICATION				
I confirm the identity of the above-named payee(s) and the account number and title. As representative of the above-named financial institution, I certify that the financial institution agrees to receive and deposit the payment identified above in accordance with 31 CFR Parts 240, 209, and 210.				
PRINT OR TYPE REPRESENTATIVE'S NAME	SIGNATURE OF REPRESENTATIVE	TELEPHONE NUMBER	DATE	

Financial institutions should refer to the GREEN BOOK for further instructions.
 THE FINANCIAL INSTITUTION SHOULD MAIL THE COMPLETED FORM TO THE GOVERNMENT AGENCY IDENTIFIED ABOVE.