

APPLICATION FOR VISION CARE PLAN (CMI)



Attn: Sales
3333 Quality Drive
Rancho Cordova, CA 95670
(800) 216-6248

Complete all applicable questions accurately and in detail.

CLIENT INFORMATION

1 Full legal name of client as it appears on the policy:

Address:

City: _____ County: _____ State: _____ ZIP: _____
Phone: _____ Fax: _____
Principal Contact: _____ Title: _____
Phone: _____ Fax: _____ E-mail: _____
Client is headquartered in state of _____ (if different state from section 1, provide physical address for client in this state)
Address:

City: _____ County: _____ State: _____ ZIP: _____

2 Who should we contact with payment questions?
Name: _____ Title: _____
Phone: _____ Fax: _____ E-mail: _____

3a Who should we contact with eligibility questions?
Name: _____ Title: _____
Phone: _____ Fax: _____ E-mail: _____

3b Does your broker need access to view/manage/update your eligibility? yes no
Name: _____ Title: _____
Phone: _____ Fax: _____ E-mail: _____

4 Who is the Benefit Administrator responsible for the overall administration of the plan (if not principal contact)?
Name: _____ Title: _____
Phone: _____ Fax: _____ E-mail: _____
If multiple benefits administrators are at other locations, attach names, addresses, emails, phone, and fax numbers.

5 What is the nature/type of your business?

6 Membership information will be sent to VSP via: Electronic Transfers Online Eligibility Management
If electronic transfer reporting OR if a third party will handle your eligibility, please provide Third Party Administrator Information.
Firm: _____
Contact: _____ Title: _____
Address:

City: _____ County: _____ State: _____ ZIP: _____
Phone: _____ Fax: _____ E-mail: _____

In conjunction with health plan industry practices when providing electronic eligibility, VSP requests clients to send dependent eligibility information to VSP. This would include providing the covered dependent's full name, date of birth, and relationship to the employee/member. Dependents will be reported as a dependent under the employee's ID number.

Will dependent information be sent to VSP for eligibility purposes? yes no

If no, please explain:

Employers without Internet access for making membership updates will be contacted by VSP to review other options.

7a Is a COBRA division is required? yes no

7b Names of additional divisions that require separate billing.

Address of additional divisions if applicable. **IMPORTANT:** Separate divisions will be billed on separate invoices
(If multiple divisions are needed, attach list of division names, contact names, address, email, phone, and fax numbers):

Billing address (if different than Client address):

City: County: State: ZIP:

Phone: Fax: E-mail:

If Self-Funded Program, do claims billings and administrative fee billings go to the same person? yes no

If no, please supply contact, title, address, phone, and fax number for each type of billing.

8 Number of employees eligible for benefits:

Does this represent the total number of employees in the company? yes no total number:

Do you have an employee population outside of the US? yes no If yes, what country :

Do you provide benefits to your retiree population? yes no

9 Dependents: Eligible dependents are the covered employee's spouse and dependent children until the end of the month that they reach their [] birthday, or the end of the month that they reach their [] birthday, if attending school full time.
(includes an unmarried child if incapable of self-support because of physical or mental incapacity that commenced prior to reaching the above age)

Dependents other than employee's spouse & children:

domestic partners (all) domestic partner's children

domestic partners (same sex only) parents (IRS qualified)

POLICY DETAILS

The rates listed must support the plan design and benefit selected and must meet all eligibility requirements. Please refer to your VSP-provided rate sheet for details or contact your VSP Account Executive. Any discrepancies may preclude acceptance by VSP.

10 Benefit Year (select one):

Service Year (from last date of service)

Calendar Year (**IMPORTANT:** Policy effective date and renewal date MUST be January 1)

11 Plan Type (select one):

Signature Plan

Choice Plan

Exam Plus

Exam Plus w/ Allowances

12 Is vision benefit: Core Voluntary Packaged with medical and/or dental

If **Voluntary** (vision is included as a stand-alone menu item in a list of benefits to choose from.):

Employer contribution percentage: for employee: % for dependent: %

Voluntary Participation Structure: *A minimum number of enrolled employees may apply.

- Exam w/Voluntary Materials* Voluntary Pool 0-24% employer contribution*
- Voluntary Pool 25% or more employer contribution* Core Employee/Voluntary Dependent Coverage*

If **Core Plus Options** (group provides a basic level of vision coverage to all employees with an option for the employee to buy up or enhance the benefit):

Employer contribution percentage: for employee: % for dependent: %

If **Packaged** (vision is tied to which of the following benefits: medical dental

13 Frequency of Service (select one):

- A (12/24/24) (**IMPORTANT: 12/24/24 is not available on voluntary plans**) B (12/12/24) C (12/12/12)
- Other:

Copayment

Split co-payment: \$ exam / \$ eyewear

OR

Total co-payment: \$ (applies to exam and eyewear)

14 a Elective Contact Lens (Allowance): \$120 \$130 \$140 \$150 \$180 other: \$

Frame (Retail Frame Allowance): \$120 \$130 \$140 \$150 \$180 other: \$

b Client has purchased Enhancements: yes no

Scratch Coating Anti-Reflective Coating Progressive Lenses Photochromic / Tint

c Client has purchased Specialty Care: yes no

- Covered Contact Lenses ProTec Safety
- Second Pair of Glasses Computer Vision Care
- Vision Therapy Preferred Laser VisionCare (available on a self-funded basis only to clients with 200+ enrolled employees)

15 Requested effective date (*The effective date should not precede the date VSP receives this application.*)

This policy will become effective on the first day of [] (month) [] (year), provided that all of the following has been completed prior to this effective date:

A. VSP has received and accepted this application.

B. VSP has received and accepted Membership, including the required information of all employees that will be covered under this policy showing name, member ID, and dependents, if applicable.

16 Schedule A Information: Fiscal Year [] through [].

Schedule A will be sent to the person named as the principal contact. A copy of the report may also be sent to your broker and/or your third party administrator.

17 Do you currently have coverage: yes no If yes, current vision plan carrier:

If current carrier is VSP, please provide Client Name:

18 For fully-insured programs (VSP will bill you for your first month's premium)

Rates

- \$
- \$
- \$
- \$

IMPORTANT: Sold rates are required to process this application

19 For self-insured programs, Administrative Fee:

Administrative fee: or Percent of claims: %

AGREEMENT

The undersigned client hereby applies for vision care coverage through VSP. It is understood that:

- A. All future employees will be covered when they become eligible, or offered VSP coverage if voluntary.
- B. Coverage will terminate for an employee on the last day of the month in which employment terminates.
- C. Member past service for clients previously covered by VSP will carry over and remain in force.
- D. Any non-VSP-created information outlining coverage or plan details must be reviewed by VSP prior to distribution to members.
- E. This agreement will continue in force 24 months from the effective date. Rates are based on the assumption that VSP will receive these amounts over the full plan term.

This application signed this [] (day) of [] (month) of [] (year).

Firm/Organization:

Name:

Title:

Signature:

Any person who knowingly and with intent to injure, defraud, or deceive any insurer, files a statement of claim or an application containing any false, incomplete or misleading information, is guilty of a felony of the third degree.

GENERAL AGENT

Please send a copy of agent/broker license, if not currently on file with VSP.

Legal Firm Name:

Address:

City:

County:

State:

ZIP:

Licensed Producer's Name:

Title:

Phone:

Fax:

E-mail:

Broker Assistant Name:

Phone:

E-mail:

Taxpayer ID:

Corporation Independent

Commission Checks Payable to:

Firm Name

Contact Name

Not Paid

Name:

Address:

City:

County:

State:

ZIP:

This application signed this [] (day) of [] (month) of [] (year).

Print Name:

Title:

Signature of state-licensed agent:

Please send a copy of agent/broker license, if not currently on file with VSP.

BROKER/CONSULTANT

The broker/consultant indicated below is hereby designated Broker of Record by the above signed employer.

Broker of Record Legal Firm Name:

Address:

City:

County:

State:

ZIP:

Licensed Producer's Name:

Title:

Phone:

Fax:

E-mail:

Additional contact name:

Phone:

E-mail:

This application signed this [] (day) of [] (month) of [] (year).

Signature of state-licensed agent:

License #:

Please include a copy of agent/broker license, if not currently on file with VSP.

COMMISSION CHECKS PAYABLE TO

Commission Checks Payable to:

Firm Name

Contact Name

Not Paid

Taxpayer ID:

Corporation

Independent

Same as licensed producer listed above

Other: Legal Firm Name:

Address:

City:

County:

State:

ZIP:

Phone:

Fax:

E-mail:

ACCOUNT MANAGEMENT / SERVICE / RENEWALS

BROKER/CONSULTANT LISTED BELOW TO RECEIVE CORRESPONDENCE

Same as licensed producer listed above

Other: Legal Firm Name:

State-licensed Agent / Contact Name:

License #:

Address:

City:

County:

State:

ZIP:

Phone:

Fax:

E-mail:

*If additional broker/consultant is to have access to this account,
copy page and specify commission percentage split (if applicable).*

Include copy of agent/broker license if not currently on file with VSP.