

Universal/Uniform Medical Assessment Form (Group size 2+)

Employer Group Name: _____

This information is used to evaluate the medical risk of a group and may be provided to the following carriers to be used in accordance with each Health Plan's Underwriting Guidelines:

BCBSNM¹
5701 Balloon Fiesta Parkway NE
Albuquerque, NM 87113
Attention: Sales – HQ – 4th Floor

Lovelace Health Plan²
4101 Indian School Road NE
Albuquerque, NM 87110
Attention: Underwriting Department
E-mail: lhs.underwriting@lovelace.com
E-fax: 505.727.9522

Presbyterian³
Contact your insurance agent
or broker, or contact our new
sales team at 505.923.5807,
or e-mail us at
presalesrfp@phs.org.

United Healthcare⁴
8220 San Pedro NE
Albuquerque, NM 87113

¹ Blue Cross and Blue Shield of New Mexico is a Division of Health Care Service Corporation, a Mutual Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association. ² Health benefit plans offered/insured by Lovelace Health System, Inc. or its subsidiary, Lovelace Insurance Company. ³ Presbyterian Health Plan, Inc. and Presbyterian Insurance Company, Inc. ⁴ United Healthcare Insurance Company

| | Last Name | First Name | Date of Birth | Male/Female | Height | Weight |
|----------|-----------|------------|---------------|-------------|--------|--------|
| Employee | | | | | | |
| Spouse | | | | | | |
| Child | | | | | | |
| Child | | | | | | |
| Child | | | | | | |
| Child | | | | | | |
| Child | | | | | | |

Home Phone: _____ - _____ Work Phone: _____ - _____ Cell: _____ - _____ Home Zip Code: _____

Directions: Please check a Yes or No for each question. If any box is checked "Yes," circle the condition (e.g. stroke) and give details below in the "Details of Medical History" section. **For additional space you may use the lower portion on page 2 of this form.** Please indicate if you or any dependents listed above have **EVER** had any signs or symptoms, or been told to have, or been treated or diagnosed with a condition for which consultation was or will be sought for any of the conditions listed below:

| | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|-----------------------------|
| 1. Heart, Stroke, Circulatory, Vascular Disease, High Blood Pressure, High Cholesterol/Triglycerides | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. Cancer, Tumors, Cysts, Leukemia, Lupus or any other Systemic Disease Type/Location (if applicable) _____ | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. Multiple Sclerosis, Cerebral Palsy, Paralysis, Bone/Joint/Back or Muscle Disorders, Gout, Arthritis, Rheumatoid Arthritis – joint(s) affected: _____ | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 4. Allergies, Asthma, Emphysema, Respiratory or Lung Disorders, Chronic Obstructive Pulmonary Disease (COPD) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 5. Eye Disorder, Cataracts, Ear, Nose, Throat, Sinus, Tonsil, Adenoid | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 6. Diabetes (specify type ____, HBA1C reading ____), Insulin Pump, Pancreas, Thyroid, Growth Disorders or Endocrine Disorder | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 7. AIDS, HIV, Sexually Transmitted Diseases, Immune System Disorders or Blood Disorders | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 8. Hepatitis (specify type ____), Cirrhosis, Liver Disorder, Digestive System Disorder, Colon Disorder, Hernia, Gallbladder, Crohn's Disease, GERD, Colitis | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 9. Kidney, End Stage Renal Disease, Bladder, Prostate, Reproductive Organs Disorder, Hysterectomy, or Seeking Treatment for Infertility | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 10. Migraines, Brain/Nervous System, Brain/Head Trauma, Seizure Disorders, Mental/Emotional Disorders, Depression, Suicide Attempt(s), Alcohol/Drug/Substance Abuse or Dependency. If Epileptic, date of last seizure: ___/___/___ | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 11. Organ, Tissue or Bone Marrow Transplant (within your lifetime) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 12. Are you, your spouse, or any dependents to be covered currently pregnant? <input type="checkbox"/> Yes <input type="checkbox"/> No Due date: ___/___/___ Expecting multiple fetuses? <input type="checkbox"/> Yes <input type="checkbox"/> No Were previous pregnancies preterm, complicated or high risk? <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 13. Fractures, Bone(s) Involved: Surgery Involved? <input type="checkbox"/> Yes <input type="checkbox"/> No Date(s) of treatment: _____ | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 14. Is any person to be covered currently taking any prescription medication(s)? If "yes" provide details below in the "Details of Medications" section. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 15. Have you or any of your dependents to be covered been hospitalized, had surgery or been treated at a facility in the past 12 months? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 16. Is there any condition not previously listed that has been a medical concern? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 17. Is there any medical treatment or procedure that has been advised, but not yet done? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 18. Have you or any of your dependents to be covered used cigarettes or other tobacco products in the past 24 months? If yes, specify member(s): _____ | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

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Employer Group Name: _____

Employee Name: _____

DETAILS OF MEDICAL HISTORY (Please be as specific as possible)

| Question # | Employee/Dependent Name | Condition/Diagnosis | Disclose Past, Current & Anticipated Treatment | Date of Onset | Treatment Date(s) | Recovery Date |
|------------|-------------------------|---------------------|------------------------------------------------|---------------|-------------------|---------------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
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| | | | | | | |

DETAILS OF MEDICATIONS

| Employee/Dependent Name | Name of Medication | Condition for which prescribed | Currently Taking? |
|-------------------------|--------------------|--------------------------------|----------------------------------------------------------|
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |

By signing below I certify that the answers provided are correct, complete and wholly true to the best of my knowledge and belief. I hereby authorize the release of or use of my protected health information to insurance carriers listed on this form for the purpose of evaluating the medical risk of the employer group of which I am a part. I understand that if I or any of my dependent(s) experience a change in health status after I complete this form or before my coverage becomes effective, it is my responsibility to let my insurance carrier listed at the top of this form know immediately. By completing this form, I warrant and represent my current and continuing authority to act on behalf of myself and all dependent(s) listed above. Coverage is subject to preexisting condition exclusions, waiting periods, creditable coverage periods, and affiliation periods as allowed by New Mexico and federal law. Premium, price or charge differentials because of gender or age based on objective, valid, and up-to-date statistical and actuarial data are not prohibited. I understand that any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to civil fines and criminal penalties.

I hereby authorize any medical provider, facility, pharmacy or pharmacy benefit manager, that possess prescription or medical history about me to furnish such health information to (any of the insurance carriers listed on this form) for the purpose of evaluating my application for insurance. Health information obtained will not be re-disclosed without my authorization unless permitted by law, in which case it may not be protected under federal privacy rules. This authorization shall be valid for two years from this date and may be revoked by sending written notice to all of the insurance carriers listed on this form.

Employee Signature: _____ Date: _____

Additional Information/Comments:
