



2027 Medicare Advantage Plans

*Klamath and Douglas County
Dual Eligible Special Needs Plans*

Plan IDs include: H3814-007 & H3814-030

**Covered zip codes in Klamath County: 97601, 97602, 97603, 97604, 97621, 97622, 97623, 97624, 97625, 97626, 97627, 97632, 97633, 97634, 97639*

January 1, 2027 - December 31, 2027

YOU *plus* ATRIO

For over 22 years we've been Oregon's local,
dependable Medicare Advantage plan.





ATRIO Health Plans is a Medicare Advantage plan with a *plus*

So many of ATRIO's plans include a \$0 premium, \$0 PCP copay, \$0 medical deductible, \$0 labs and annual exams, plus so many other money-saving benefits. Our comprehensive plans provide easy access to the care you need with a local member services team that supports you and helps make your life easier. When you choose ATRIO, you are part of a team.

ATRIO has been serving Oregon residents for over 22 years. We are community-based, and work closely with local providers to improve health outcomes for our members in the places we serve.

Our goal: Make your plan easy to understand and use, so you're always getting the most from your ATRIO Health Plans Medicare Advantage coverage.

This 2027 ATRIO Enrollment Kit has everything you need to compare your ATRIO Medicare Advantage plan options, see the value of our extra benefits, and complete the enrollment process. Whether it's protecting your health, saving money or making your life a little easier, ATRIO Health Plans checks all the boxes for Oregonians.

ATRIO Health Plans is a PPO, PPO C-SNP, and HMO D-SNP with Medicare and Oregon Health Plan contracts. Enrollment in ATRIO Health Plans depends on contract renewal.



Medicare Explained

Original Medicare is offered by the federal government and has two “Parts”:

Medicare Part A is hospital insurance, and generally covers inpatient hospital care, skilled nursing facility, hospice, and home health care.

Medicare Part B is medical insurance that covers doctor’s office visits, diagnostic lab and x-rays, outpatient services like surgery, flu shots, some medications, and more.

Part D Prescription Drug Coverage is not included with Original Medicare and is offered by private insurance companies. Note if you do not enroll in a Part D plan when you first become eligible for Medicare, you may have to pay a “late enrollment penalty” (LEP) for each month you delayed your Part D coverage. This LEP must be paid monthly for as long you are in a Part D plan.

Medicare Advantage

Medicare Advantage (MA) Plans (sometimes called “Part C”) are offered by private companies and combine Medicare Part A and Part B coverage together with other benefits Medicare doesn’t cover – like dental, vision, and hearing. Many also offer Part D coverage, bringing all these benefits into a single plan!

Like most MA plans, ATRIO Health Plans has networks of participating doctors, hospitals, pharmacies, and other care providers. Our members can visit any provider they choose,* but usually pay less with those in our networks. You do not have to choose a Primary Care Physician (PCP), but we encourage you to! A network PCP helps coordinate your care and get the most out of your benefits.

MA Eligibility: To join an ATRIO MA plan you must be entitled to Medicare Part A, be enrolled in Medicare Part B, and live in our service area. If you are enrolled in one of our plans you must continue to pay your monthly Medicare Part B premium.

**Out-of-network / non-contracted providers are under no obligation to treat Plan members, except in emergency situations. Please call Member Services or see your Evidence of Coverage for more information, including the cost sharing that applies to out-of-network services.*

Drug Coverage

Like most MA plans with drug coverage, ATRIO Health Plans has a “formulary” or list of drugs covered by the plan. The formulary offers a wide selection of Medicare-approved, cost-effective generic and brand name options. Each drug is on one of six drug “tiers.” Your cost-share usually increases by tier, up to the highest cost-sharing tier 5 (tier 6 drugs have \$0 copays).

Tier 1: Preferred Generic – low-cost generic drugs

Tier 2: Generic – most generic drugs and select brand drugs

Tier 3: Preferred Brand – preferred-brand and some high-cost generic drugs

Tier 4: Non-Preferred Brand – non-preferred brand and some high-cost generic drugs (approved non-formulary exception drugs are on this tier)

Tier 5: Specialty – specialty drugs (limited to a one-month supply)

Tier 6: Select Care Drugs – some important drugs at a \$0 copay, like Part D vaccines, and selected generic ACE/ARB, anti-diabetic drugs, and statins for treatment of chronic conditions

The formulary also covers some over-the-counter (OTC) drugs, with a prescription from your doctor, at no cost to you.

What if my drug is not on the formulary?

If you can't find your drug, call Member Services or ask your pharmacist for a list of other drug options. You can also talk to your doctor about a different drug on the formulary, or you may submit a “Coverage Determination” request for a formulary exception. Visit atriohp.com for more information or you can ask your doctor to submit one for you.

What are the types of formulary drug restrictions?

Prior Authorization (PA) – an approval needed before getting the drug

Quantity Limits (QL) – a limit on how much of the drug you can get at a time

Step Therapy (ST) – a need to try another drug(s) for the same condition first

Part B vs. D Review – a check if the drug is covered under Part B or Part D

Top 100 Most Commonly Prescribed Medications

Brand Name	Strength Desc	Dosage Form	Tier Number
Albuterol Sulfate HFA	90 MCG	HFA Aerosol AD	4
Alendronate Sodium	70 MG	Tablet	2
Allopurinol	100 MG	Tablet	4
Alprazolam	0.5 MG	Tablet	1
Amitriptyline HCL	25 MG	Tablet	1
Amlodipine Besylate	5 MG	Tablet	1
Amoxicillin	500 MG	Capsule	1
Amoxicillin-Clavulanate Potass	875-125 MG	Tablet	2
Aripiprazole	5 MG	Tablet	2
Atenolol	25 MG	Tablet	1
Atorvastatin Calcium	40 MG	Tablet	6
Azithromycin	250 MG	Tablet	2
Baclofen	10 MG	Tablet	4
Budesonide-Formoterol Fumarate	160-4.5MCG	HFA Aerosol AD	2
Bupropion XL	150 MG	Tablet ER 24H	4
Buspirone HCL	10 MG	Tablet	1
Carvedilol	6.25 MG	Tablet	1
Celecoxib	200 MG	Capsule	2
Cephalexin	500 MG	Capsule	4
Citalopram HBR	20 MG	Tablet	4
Clobetasol Propionate	0.05%	Cream (G)	4
Clonazepam	0.5 MG	Tablet	2
Clopidogrel	75 MG	Tablet	1
Cyclobenzaprine HCL	10 MG	Tablet	4
Donepezil HCL	10 MG	Tablet	2
Doxycycline Hyclate	100 MG	Capsule	2
Duloxetine HCL	60 MG	Capsule DR	4
Eliquis	5 MG	Tablet	3
Escitalopram Oxalate	10 MG	Tablet	2
Estradiol	0.01%	Cream/Appl	4
Ezetimibe	10 MG	Tablet	1
Famotidine	20 MG	Tablet	4
Finasteride	5 MG	Tablet	1
Fluoxetine HCL	20 MG	Capsule	4
Fluticasone Propionate	50 MCG	Spray Susp	4
Fluticasone-Salmeterol	250-50 MCG	Blister Powder	4
Furosemide	20 MG	Tablet	1
Gabapentin	300 MG	Capsule	2
Hydrochlorothiazide	25 MG	Tablet	1
Hydrocodone-Acetaminophen	5 MG-325MG	Tablet	4
Hydroxyzine HCL	25 MG	Tablet	1
Ibuprofen	800 MG	Tablet	1
Isosorbide Mononitrate Er	30 MG	Tablet ER 24H	1
Jardiance	10 MG	Tablet	3
Ketoconazole	2%	Shampoo	2
Lamotrigine	100 MG	Tablet	2
Lantus Solostar	100 UNITS/ML (3)	Insuln Pen	3
Latanoprost	0.005%	Drops	1
Levothyroxine Sodium	75 MCG	Tablet	4
Lisinopril	20 MG	Tablet	6
Lisinopril-Hydrochlorothiazide	20-12.5 MG	Tablet	6



2027 Medicare Advantage Enrollment Kit

Lorazepam	0.5 MG	Tablet	1
Losartan Potassium	50 MG	Tablet	6
Losartan-Hydrochlorothiazide	50-12.5 MG	Tablet	6
Lovastatin	40 MG	Tablet	6
Meloxicam	15 MG	Tablet	1
Metformin HCL	500 MG	Tablet	6
Metformin HCL ER	500 MG	Tablet ER 24H	6
Methocarbamol	500 MG	Tablet	1
Metoprolol Succinate	25 MG	Tablet ER 24H	1
Metoprolol Tartrate	25 MG	Tablet	4
Mirtazapine	15 MG	Tablet	2
Montelukast Sodium	10 MG	Tablet	1
Mounjaro	5 MG/0.5ML	Pen Injctr	3
Nystatin	100000/G	Powder	2
Olanzapine	5 MG	Tablet	2
Olmesartan Medoxomil	20 MG	Tablet	6
Omeprazole	20 MG	Capsule DR	1
Ondansetron ODT	4 MG	Tablet (Orally Disintegrating)	2
Oxycodone HCL	5 MG	Tablet	4
Oxycodone-Acetaminophen	5 MG-325MG	Tablet	2
Ozempic	2MG/0.75ML	Pen Injctr	3
Pantoprazole Sodium	40 MG	Tablet DR	4
Pioglitazone HCL	30 MG	Tablet	6
Potassium Chloride	10 MEQ	Tablet ER	4
Pravastatin Sodium	40 MG	Tablet	6
Prednisone	20 MG	Tablet	2
Pregabalin	150 MG	Capsule	2
Progesterone	100 MG	Capsule	2
Propranolol HCL	20 MG	Tablet	1
Quetiapine Fumarate	25 MG	Tablet	2
Rosuvastatin Calcium	10 MG	Tablet	6
Sacubitril-Valsartan	24 MG-26MG	Tablet	2
Sertraline HCL	100 MG	Tablet	4
Simvastatin	20 MG	Tablet	6
Spironolactone	25 MG	Tablet	1
Sulfamethoxazole-Trimethoprim	800-160 MG	Tablet	2
Tamsulosin HCL	0.4 MG	Capsule	1
Tizanidine HCL	4 MG	Tablet	4
Topiramate	50 MG	Tablet	1
Torsemide	20 MG	Tablet	1
Tramadol HCL	50 MG	Tablet	4
Trazodone HCL	50 MG	Tablet	1
Trelegy Ellipta	100MCG - 62.5MCG	Blister Powder	3
Triamcinolone Acetonide	0.1%	Cream (G)	2
Valacyclovir	1000 MG	Tablet	2
Venlafaxine HCL ER	75 MG	Capsule ER 24H	4
Warfarin Sodium	5 MG	Tablet	1
Xarelto	20 MG	Tablet	3
Zolpidem Tartrate	10 MG	Tablet	4



Need help managing your prescription drug costs for 2027?

The Medicare Prescription Payment Plan program (MPPP) helps you manage your out-of-pocket drug costs by spreading them out across the calendar year **(although it will not save you money or lower your drug costs)**. ATRIO members who are most likely to benefit from the program will receive more details in the mail.

Participation in the MPPP program is optional.

For eligible prescriptions, you pay \$0 at the pharmacy for covered Part D drugs and will be billed monthly by ATRIO. The amount billed monthly will be based on your monthly prescription costs as well as the \$2,400 out-of-pocket annual maximum using a standardized formula created by CMS (Centers for Medicare & Medicaid Services). Once you pay \$2,400, you move to the Catastrophic Coverage phase and ATRIO pays 100% of your prescription drug costs. More information on prescription coverage and examples of monthly calculations can be found online at atriohp.com.

2027 Benefits at a Glance

ATRIO Health Plans Medicare Advantage Plans

ATRIO Special Needs Plan (HMO D-SNP) - Klamath County and Douglas County, OR



*The **ATRIO Special Needs Plan (HMO D-SNP)** is a Medicare Advantage HMO plan designed for people who have both Medicare Parts A & B and full Oregon Health Plan (OHP) (Medicaid) benefits. **Plan and/or drug cost-sharing (not all shown below) will apply if a plan member loses their Medicaid eligibility.***

Medical Benefits

Plan Costs	ATRIO Special Needs Plan (HMO D-SNP) Klamath County H3814-007	ATRIO Special Needs Plan (HMO D-SNP) Douglas County H3814-030
Monthly plan premium	\$0	\$0
Plan deductible	No Deductible	No Deductible
Annual out-of-pocket maximum*	\$0	\$0

Doctor Office Visits	In-network	In-network
Primary care provider (PCP)	\$0	\$0
Specialist	\$0	\$0
Telehealth (if provider offers Telahealth)	\$0	\$0

Inpatient Care	In-network	In-network
Inpatient hospital care	\$0	\$0
Skilled nursing facility (SNF)	\$0	\$0

Outpatient Care	In-network	In-network
Outpatient hospital	\$0	\$0
Ambulatory surgery center	\$0	\$0
Home health care	\$0	\$0
Diabetes supplies	\$0	\$0
Durable medical equipment	\$0	\$0

Labs and Tests	In-network	In-network
Laboratory services	\$0	\$0
Diagnostic imaging (MRI/CT/PET)	\$0	\$0
X-rays	\$0	\$0
Emergency Services		
Ambulance (air & ground)	\$0	\$0
Emergency room	\$0	\$0
Urgently needed care	\$0	\$0

**The most you will pay in a year for covered medical services*

Supplemental Benefits

See the “Extra Benefits” section of the Enrollment Kit for a more detailed overview.

	ATRIO Special Needs Plan (HMO D-SNP) <i>Klamath County H3814-007</i>	ATRIO Special Needs Plan (HMO D-SNP) <i>Douglas County H3814-030</i>
Flex Card Benefits		
Routine chiropractic, acupuncture, and naturopathy services	\$300 allowance every six months [†] , loaded to your Flex Card, for combined routine chiropractic, acupuncture and naturopathy services (\$600 annual allowance)	\$300 allowance every six months [†] , loaded to your Flex Card, for combined routine chiropractic, acupuncture and naturopathy services (\$600 annual allowance)
Preventive & comprehensive dental services	\$300 every six months [†] , loaded to your Flex Card, for comprehensive and preventive dental services (Excludes cosmetic procedures) (\$600 annual allowance)	\$500 every six months [†] , loaded to your Flex Card, for comprehensive and preventive dental services (Excludes cosmetic procedures) (\$1,000 annual allowance)
Over-the-Counter (OTC) items	\$175 allowance every three months [†] , loaded to your Flex Card, for select OTC items (\$700 annual allowance)	\$85 allowance every three months [†] , loaded to your Flex Card, for select OTC items (\$340 annual allowance)
Supplemental Benefits		
Fitness benefit	\$380 every six months [†] , available through reimbursement for gym membership fees and fitness classes	\$300 every six months [†] , available through reimbursement for gym membership fees and fitness classes
Routine vision exam	\$0 copay, 1 exam per year (in-network only)	\$0 copay, 1 exam per year (in-network only)
Routine vision hardware	\$250 allowance for frames (standard lenses included) or contact lenses every two years (in-network only)	\$250 allowance for frames (standard lenses included) or contact lenses every two years (in-network only)

† Balance does not roll over

	ATRIO Special Needs Plan (HMO D-SNP) <i>Klamath County H3814-007</i>	ATRIO Special Needs Plan (HMO D-SNP) <i>Douglas County H3814-030</i>
Transportation	\$0 for 24 one-way trips every year to plan-approved health-related locations	\$0 for 24 one-way trips every year to plan-approved health-related locations
Meals	Up to 2 meals per day for 14 days after a qualifying event	Up to 2 meals per day for 14 days after a qualifying event
Personal Emergency Response System (PERS)	\$0 for wearable medical alert system and monitoring through LifeStation, including wristwatch option with heart rate monitor and step counter	\$0 for wearable medical alert system and monitoring through LifeStation, including wristwatch option with heart rate monitor and step counter

Prescription Drug Benefits

When you enroll, the plan will mail you a “LIS Rider” showing your LIS subsidy level. Depending on your LIS level, you pay the drug costs below until your total out-of-pocket costs reach \$2,400 (including drugs purchased through your retail pharmacy or mail order, or if you are in a long-term care facility).

Subsidy Level	ATRIO Special Needs Plan (HMO D-SNP) <i>H3814-007 & H3814-030</i>
Part D Deductible	\$0
LIS Level 1	Generic drugs \$5.80; \$14.40 for brand and all other drugs
LIS Level 2	Generic drugs \$1.65; \$5.00 for brand and all other drugs
LIS Level 3	\$0
Catastrophic coverage	\$0

ATRIO Health Plans is a PPO, PPO C-SNP and HMO D-SNP with Medicare and Oregon Health Plan contracts. Enrollment in ATRIO Health Plans depends on contract renewal. Out-of-network / non-contracted providers are under no obligation to treat Plan members except in emergency situations. Please call Member Services or see your Evidence of Coverage for more information, including the cost sharing that applies to out-of-network services.

Additional Benefits

More for your health.
More for your money.

Every ATRIO Medicare Advantage plan features the **Flex Card**: a special debit card preloaded with dollars for dental, select over-the-counter drugstore items, as well as routine chiropractic, acupuncture, and naturopathy services.



ATRIO Flex Card

Just swipe your Flex Card to pay for eligible items or services, and the amount will be deducted from your card's balance.

See included 'Summary of Benefits' for plan allowances and more information on all additional benefits



DENTAL

You receive an allowance to spend on dental care. **You choose your dentist and how to spend your dental funds**, up to your ATRIO plan's Flex Card allowance, on dental services including routine preventive care (like office visits, oral exams, cleanings, fluoride treatments and x-rays) and comprehensive care (like diagnostic or restorative services, tooth extractions, or oral surgeries).



OVER-THE-COUNTER (OTC)

You receive an allowance to spend on select health-related OTC items each quarter. **Use your Flex Card to get what you need by catalog, online or on the app, by phone, or at participating retailers.**



ALTERNATIVE THERAPY SERVICES

You receive an allowance to spend on **routine chiropractic, acupuncture, and naturopathy services**. You choose the provider!

(Allowances do not roll over - be sure to use them before the end of each benefit period)



FITNESS

Get reimbursed for eligible gym membership fees and fitness classes, up to your benefit amount.



VISION

You pay \$0 for a routine eye exam each year, **plus receive an allowance for eyeglasses** (frames and lenses) **or for contact lenses**.

Must use VSP Vision Care® providers for supplemental exams and eyewear benefits.



TRANSPORTATION (NON-EMERGENCY)

You pay \$0 for 24 one-way rides each year to your doctor, pharmacy, gym, or other plan-approved, health-related location.

Must use MediDrive providers for in-network non-emergency transportation.



MEALS

You pay \$0 for up to 28 meals (2 per day for 14 days) after each hospital or Skilled Nursing Facility stay or with some Home Health services. Meals are delivered to your home and can be tailored to your specific health or dietary needs.

Must use GA Foods for in-network meal delivery benefit.



WEARABLE DEVICES

You pay \$0 for a wearable medical alert system and monitoring, including pendant and wristwatch options that include a heart rate monitor and walking step counter.

Must use LifeStation providers for in-network medical alert system benefit.



Contact & Access Information

Visit atriohp.com for more information on additional benefits, or contact the appropriate service provider directly using the contact information below.

Flex Card – &more

To check balance or place an order call 1-855-263-6673 (TTY 711) from Monday – Friday, 8 a.m. to 8 p.m. PST. To report a lost or stolen card call ATRIO Member Services at 1-877-672-8620 (TTY 711).

Vision – VSP Vision Care

To find a VSP Advantage network eye doctor, call 1-844-344-0572 (TTY 1-800-428-4833), daily from 8 a.m. to 8 p.m., local time

OTC – &more

To place an order, or for more information call 1-855-263-6673 (TTY 711) from Monday – Friday, 8 a.m. to 8 p.m. PST. Catalogs can be found online at atriohp.com

Transportation – MediDrive

To schedule a ride, call 1-888-617-0467 (TTY 711), Monday – Friday, 6 a.m. to 6 p.m., local time

Meals - GA Foods

To request meals after an inpatient stay, call ATRIO Customer Service at 1-877-672-8620 (TTY 711) daily, from 8 a.m. - 8p.m.

Wearable Alerts – LifeStation

To place an order or if you have questions call LifeStation Customer Service at 1-888-809-3112, Monday – Friday from 5 a.m. to 8 p.m. PST



2027 Medicare Advantage

Summary of Benefits

**Klamath and Douglas County
Dual Eligible Special Needs Plans**

Plan IDs include: H3814-007 & H3814-030

**Covered zip codes in Klamath County: 97601, 97602, 97603, 97604, 97621, 97622, 97623, 97624, 97625, 97626, 97627, 97632, 97633, 97634, 97639*

January 1, 2027 - December 31, 2027

Pre-Enrollment Checklist

Before making an enrollment decision, it is important that you fully understand our benefits and rules. If you have any questions, you can call and speak to a customer service representative at 1-877-672-8620 (TTY 711).

Understanding the Benefits

- ☐ The Evidence of Coverage (EOC) provides a complete list of all coverage and services. It is important to review plan coverage, costs, and benefits before you enroll. Visit atriohp.com or call 1-877-672-8620 (TTY 711) to view a copy of the EOC.
- ☐ Review the provider directory (or ask your doctor) to make sure the doctors you see now are in the network. If they are not listed, it means you will likely have to select a new doctor.
- ☐ Review the pharmacy directory to make sure the pharmacy you use for any prescription medicines is in the network. If the pharmacy is not listed, you will likely have to select a new pharmacy for your prescriptions.
- ☐ Review the formulary to make sure your drugs are covered.

Understanding Important Rules

- ☐ In addition to your monthly plan premium, you must continue to pay your Medicare Part B premium. This premium is normally taken out of your Social Security check each month.
- ☐ Benefits, premiums and/or copayments/co-insurance may change on January 1, 2028.
- ☐ Except in emergency or urgent situations, we do not cover services by out-of-network providers (doctors who are not listed in the provider directory).
- ☐ This plan is a dual eligible special needs plan (D-SNP). Your ability to enroll will be based on verification that you are entitled to both Medicare and medical assistance from a state plan under Medicaid.

About the Summary of Benefits and Who Can Join

This is a summary of ATRIO Health Plans health and drug services covered by ATRIO Special Needs Plan (HMO D-SNP). The benefit information provided does not list every service that we cover or list every limitation or exclusion. For a complete list of services we cover, please view the Evidence of Coverage at atriohp.com. To join an ATRIO Health Plans Medicare Advantage Plan, you must be entitled to Medicare Part A, be enrolled in Medicare Part B, and live in our service area.

Our plans and service areas:

H3814-007 ATRIO Special Needs Plan (HMO D-SNP) includes these Counties in Oregon: Klamath

H3814-030 ATRIO Special Needs Plan (HMO D-SNP) includes these Counties in Oregon: Douglas

ATRIO is not available in these Klamath County zip codes: 97425, 97731, 97733, 97737 and 97739.

Which Doctors, Hospitals and Pharmacies Can I Use?

ATRIO Health Plans has a network of doctors, hospitals, pharmacies, and other providers. If you use the providers in our network, you may pay less for your covered services. If you use providers that are not in our network, you may pay a higher out-of-pocket cost. You must generally use network pharmacies to fill your prescription drugs (if you choose a plan that includes drug coverage). You can see our plan's Formulary (Part D prescription drug list), Provider Directory and Pharmacy Directory at our website, atriohp.com.

Tips for Comparing Your Medicare Choices

If you want to know more about the coverage and costs of Original Medicare, look in your current "Medicare & You" handbook. View it online at Medicare.gov or get a copy by calling 1-800-MEDICARE (1-800-633-4227), 24 hours a day, 7 days a week. TTY users should call 1-877-486-2048.

(Services marked with an * may require prior authorization)

	ATRIO Special Needs Plan (HMO D-SNP) H3814007 Klamath	ATRIO Special Needs Plan (HMO D-SNP) H3814030 Douglas
Monthly Plan Premium <i>(includes both medical and drugs)</i>	\$0	\$0
Deductible	The Part B deductible was \$283. This is the 2026 cost sharing amount and may change in 2027. ATRIO Special Needs Plan (HMO D-SNP) will provide updated rates at atriohp.com as soon as they are released.	The Part B deductible was \$283. This is the 2026 cost sharing amount and may change in 2027. ATRIO Special Needs Plan (HMO D-SNP) will provide updated rates at atriohp.com as soon as they are released.
Maximum Out-of-Pocket <i>(does not include Part D prescription drugs)</i>	You pay nothing for Medicare-covered services in our network. Except for emergency and urgently needed care, out-of-network coverage is not included; you may have to pay the full cost for services received outside of our medical and pharmacy networks. If you reach the limit on out-of-pocket costs, your hospital and medical services will continue to be covered and we will pay the full cost for the rest of the year.	You pay nothing for Medicare-covered services in our network. Except for emergency and urgently needed care, out-of-network coverage is not included; you may have to pay the full cost for services received outside of our medical and pharmacy networks. If you reach the limit on out-of-pocket costs, your hospital and medical services will continue to be covered and we will pay the full cost for the rest of the year.
Inpatient Hospital coverage	In-Network \$0 copay for each Medicare-covered hospital stay. \$0 copay for an additional 60 lifetime reserve days.*	In-Network \$0 copay for each Medicare-covered hospital stay. \$0 copay for an additional 60 lifetime reserve days.*

(Services marked with an * may require prior authorization)

	ATRIO Special Needs Plan (HMO D-SNP) H3814007 Klamath	ATRIO Special Needs Plan (HMO D-SNP) H3814030 Douglas
Outpatient Hospital coverage		
Outpatient hospital services	In-Network \$0 copay*	In-Network \$0 copay*
Outpatient hospital observation services	In-Network \$0 copay*	In-Network \$0 copay*
Ambulatory Surgical Center (ASC)	In-Network \$0 copay*	In-Network \$0 copay*
Doctor Visits		
Primary Care Providers	In-Network \$0 copay	In-Network \$0 copay
Specialists	In-Network \$0 copay	In-Network \$0 copay
Preventive Care (e.g., flu vaccine, diabetic screenings)	In-Network \$0 copay	In-Network \$0 copay
Emergency care	\$0 copay	\$0 copay
Urgently needed services	\$0 copay	\$0 copay
Diagnostic Services/Labs/Imaging		
Diagnostic tests and procedures	In-Network \$0 copay*	In-Network \$0 copay*
Lab services	In-Network \$0 copay*	In-Network \$0 copay*

(Services marked with an * may require prior authorization)

	ATRIO Special Needs Plan (HMO D-SNP) H3814007 Klamath	ATRIO Special Needs Plan (HMO D-SNP) H3814030 Douglas
Diagnostic radiology services (e.g. MRI, CAT Scan)	In-Network \$0 copay*	In-Network \$0 copay*
Outpatient X-rays	In-Network \$0 copay*	In-Network \$0 copay*
Therapeutic Radiology	In-Network \$0 copay*	In-Network \$0 copay*
Hearing services Medicare-covered exam to diagnose and treat hearing and balance issues	In-Network \$0 copay	In-Network \$0 copay
Dental services †Benefit does not roll over	\$300 allowance every six months† loaded to your Flex Card, for all additional preventive and comprehensive dental services. Excludes cosmetic procedures.	\$500 allowance every six months† loaded to your Flex Card, for all additional preventive and comprehensive dental services. Excludes cosmetic procedures.
Vision care Medicare-covered exam to diagnose and treat diseases and conditions of the eye For people with diabetes, screening for diabetic retinopathy is covered once per year.	In-Network \$0 copay In-Network \$0 copay	In-Network \$0 copay In-Network \$0 copay

(Services marked with an * may require prior authorization)

	ATRIO Special Needs Plan (HMO D-SNP) H3814007 Klamath	ATRIO Special Needs Plan (HMO D-SNP) H3814030 Douglas
Routine eye exam (services not covered by Medicare) administered by VSP Additional routine eyewear	In-Network \$0 copay Limited to 1 visit every year In-Network \$250 combined allowance every two years for contact lenses or eyeglass frames and lenses.	In-Network \$0 copay Limited to 1 visit every year In-Network \$250 combined allowance every two years for contact lenses or eyeglass frames and lenses.
Mental Health Services Inpatient visit	In-Network \$0 copay for each Medicare-covered hospital stay. \$0 copay for an additional 60 lifetime reserve days.*	In-Network \$0 copay for each Medicare-covered hospital stay. \$0 copay for an additional 60 lifetime reserve days.*
Skilled nursing facility (SNF) care	In-Network \$0 copay for each Medicare-covered skilled nursing facility stay. \$0 copay for an additional 60 lifetime reserve days.*	In-Network \$0 copay for each Medicare-covered skilled nursing facility stay. \$0 copay for an additional 60 lifetime reserve days.*
Physical Therapy	In-Network \$0 copay*	In-Network \$0 copay*
Ambulance services Ground Ambulance	In-Network \$0 copay <i>Prior Authorization required for non-emergent transportation.</i>	In-Network \$0 copay <i>Prior Authorization required for non-emergent transportation.</i>

(Services marked with an * may require prior authorization)

	ATRIO Special Needs Plan (HMO D-SNP) H3814007 Klamath	ATRIO Special Needs Plan (HMO D-SNP) H3814030 Douglas
Air Ambulance	In-Network \$0 copay <i>Prior Authorization required for non-emergent transportation.</i>	In-Network \$0 copay <i>Prior Authorization required for non-emergent transportation.</i>
Transportation (additional routine) <i>Must use MediDrive for covered trips</i>	\$0 copay Routine transportation for up to 24 trips every year. A trip is considered one-way transportation by taxi, van, medical transport, or rideshare services to a plan approved health-related location.	\$0 copay Routine transportation for up to 24 trips every year. A trip is considered one-way transportation by taxi, van, medical transport, or rideshare services to a plan approved health-related location.
Medicare Part B drugs		
Chemotherapy/Radiation drugs	In-Network \$0 copay*	In-Network \$0 copay*
Other Part B drugs	In-Network \$0 copay*	In-Network \$0 copay*

Additional Benefits

(Services marked with an * may require prior authorization)

	ATRIO Special Needs Plan (HMO D-SNP) H3814007 Klamath	ATRIO Special Needs Plan (HMO D-SNP) H3814030 Douglas
Chiropractic, Acupuncture & Naturopathy Services (Supplemental routine services) †Benefit does not roll over	\$300 allowance every six months†, loaded to your Flex Card, for combined routine chiropractic, acupuncture and naturopathy services.	\$300 allowance every six months†, loaded to your Flex Card, for combined routine chiropractic, acupuncture and naturopathy services.
Chiropractic services Medicare-covered: Manipulation of the spine to correct a subluxation (when 1 or more of the bones of your spine move out of position)	In-Network \$0 copay	In-Network \$0 copay
Durable medical equipment (DME) and related supplies DME supplies are not eligible for Flex Card OTC spend	In-Network \$0 copay*	In-Network \$0 copay*
Fitness program †Benefit does not roll over	\$380 allowance every six months† available through reimbursement for gym membership fees and fitness classes.	\$300 allowance every six months† available through reimbursement for gym membership fees and fitness classes.
Meal benefit	\$0 copay for up to 2 meals per day for 14 days (28 meals per episode) (inpatient or SNF direct admissions/ post hospital).*	\$0 copay for up to 2 meals per day for 14 days (28 meals per episode) (inpatient or SNF direct admissions/ post hospital).*

(Services marked with an * may require prior authorization)

	ATRIO Special Needs Plan (HMO D-SNP) H3814007 Klamath	ATRIO Special Needs Plan (HMO D-SNP) H3814030 Douglas
Outpatient rehabilitation services Services provided by an occupational therapist	In-Network \$0 copay*	In-Network \$0 copay*
Over-the-counter (OTC) Benefit †Benefit does not roll over	\$175 every three months†, loaded to your Flex Card for select OTC items. Find eligible OTC products using our Flex Card app on your smartphone. DME items are not eligible OTC products.	\$85 every three months†, loaded to your Flex Card for select OTC items. Find eligible OTC products using our Flex Card app on your smartphone. DME items are not eligible OTC products.
Partial hospitalization services and intensive outpatient services	In-Network \$0 copay*	In-Network \$0 copay*
Personal emergency response system (PERS)	\$0 copay for wearable medical alert system and monitoring through LifeStation, including wristwatch option with heart rate monitor and step counter. Spanish-language device is also available.*	\$0 copay for wearable medical alert system and monitoring through LifeStation, including wristwatch option with heart rate monitor and step counter. Spanish-language device is also available.*
Additional routine foot care	In-Network \$0 copay Unlimited visits every year \$500 allowance every year	In-Network \$0 copay Unlimited visits every year \$500 allowance every year
Welcome to Medicare preventive visit	In-Network \$0 copay	In-Network \$0 copay

Prescription Drug Coverage		
	ATRIO Special Needs Plan (HMO D-SNP) H3814007 Klamath	ATRIO Special Needs Plan (HMO D-SNP) H3814030 Douglas
Stage 1: Annual Prescription Deductible		
Deductible	There is no yearly deductible	There is no yearly deductible
Stage 2: Initial Coverage (after you pay your deductible, if applicable)		
LIS Level 1	Generic drugs \$5.80; \$14.40 for brand and all other drugs	Generic drugs \$5.80; \$14.40 for brand and all other drugs
LIS Level 2	Generic drugs \$1.65; \$5.00 for brand and all other drugs	Generic drugs \$1.65; \$5.00 for brand and all other drugs
LIS Level 3	Generic drugs \$0; \$0 for brand and all other drugs	Generic drugs \$0; \$0 for brand and all other drugs
Stage 3:		
Catastrophic Coverage	\$0	\$0

Cost-sharing may differ based on point-of-service (mail-order, retail, Long Term Care (LTC)), home infusion, whether the pharmacy is in our standard network, or whether the prescription is a short-term (31-day supply) or long term (100-day supply).

- Save one month's copay by switching to a 90-day supply at a network retail or mail-order pharmacy. Ask your doctor about a 100-day supply and save even more (restrictions apply).
- If you reside in a long-term facility, you pay the same as at a retail pharmacy. If you choose mail-order, you pay the same as a retail 90-day supply at an in-network pharmacy. You may get drugs from an out-of-network pharmacy but may pay more than you pay at an in-network pharmacy.
- What you pay for vaccines - our plan covers most Part D vaccines at no cost to you, even if you haven't met your deductible. Please call ATRIO Member Services for more information.

Comprehensive Written Statement for Prospective Enrollees

The benefits described in the Premium and Benefit section of the Summary of Benefits are covered by our Medicare Advantage plan. For each benefit listed, you can see what our plan covers. What you pay for covered services may depend on your level of Medicaid eligibility. Coverage of the benefits described in this Summary of Benefits depends upon your level of Medicaid eligibility. If you have questions about your Medicaid eligibility and what benefits you are entitled to, call Oregon Health Plan (Medicaid) toll-free at 1-800-699-9075 (TTY: 711).

Benefit Category	Oregon Health Plan (Medicaid)
Substance Use Disorder Treatment	Such as counseling, medication assisted treatment, acupuncture, residential treatment, and peer delivered services.
Dental	• Basic services including cleaning, fluoride varnish, fillings and extraction • Urgent or immediate treatment • Dentures • Stainless steel crowns for molars (back teeth)
Hearing	Hearing aids and hearing aid exams
Home health	Private duty nursing
Hospice care	End-of-life care
Hospital care	• Emergency treatment • Inpatient and outpatient care
Immunizations and vaccines	Such as the flu shot or measles-mumps-rubella (MMR) vaccine

Benefit Category	Oregon Health Plan (Medicaid)
Prenatal, labor, delivery and postpartum care	• Doula care • Prenatal checkups • Labor and delivery in a hospital, birthing center or at home • Newborn nurse home visits • Postpartum counseling
Lab tests and X-rays	Laboratory tests and x-rays, such as blood screening and mammograms
Medicare care from a physician, nurse practitioner, or physician assistant	Such as a routine check-up or a general appointment
Medical equipment and supplies	Such as diabetes testing strips or crutches
Medical transportation	Such as an ambulance or non-emergency transportation to an appointment
Mental health care	Such as therapy or medical treatment
Physical, occupational and speech therapy	Therapy to improve skills or function for daily living
Prescription drugs	OHP with Limited Drug only includes drugs that are not covered by Medicare Part D
Vision	• Medical services • Services to correct vision for pregnant women and children under 21 • Glasses are covered for pregnant adults and adults who have a qualifying medical condition such as aphakia or keratoconus, or after cataract surgery

- What you pay for insulin - our plan covers select insulin products, for which you will pay no more than \$35 for a one-month supply no matter what tier it is on, and even if you haven't met your deductible.

ATRIO Health Plans are PPO, PPO C-SNP and HMO D-SNP plans with Medicare and Oregon Health Plan contracts. Enrollment in ATRIO Health Plans depends on contract renewal.

Out-of-network/non-contracted providers are under no obligation to treat ATRIO Health Plans members, except in emergency situations. For a decision about whether we will cover an out-of-network service, we encourage you or your provider to ask us for a pre-service organization determination before you receive the service. Please call our Member Services number at 1-877-672-8620 (TTY 711), Daily 8 a.m. to 8 p.m. local time or see your Evidence of Coverage for more information, including the cost sharing that applies to out-of-network services.



ME *plus* **+**
ATRIO

How to Enroll

It's easy to enroll in an ATRIO Medicare Advantage Plan.
Choose one of the 5 ways listed below.

1

Online

Go online and complete an online enrollment form!
atriohp.com

2

By Phone

Call us and one of our advisors can assist you
in completing your enrollment.
[1-888-201-8818](tel:1-888-201-8818) (TTY 711)

3

In Person

Visit your nearest ATRIO Health Plans office and one of
our advisors can help you with your enrollment.
[Find an office: atriohp.com](http://atriohp.com) or call [1-888-201-8818](tel:1-888-201-8818) (TTY 711)

4

At Your Home

We can send a local advisor to your home or provide
a virtual appointment to help you complete your
enrollment.
[1-888-201-8818](tel:1-888-201-8818) (TTY 711)

5

Mail or Fax

Complete the paper Enrollment Form found in this kit
and mail or fax the form to us at:

Mail:

ATRIO Health Plans
338 Jericho Turnpike #135
Syosset, NY 11791

Fax:

[1-602-975-4071](tel:1-602-975-4071)

Enrollment Checklist

Before making an enrollment decision, it is important that you fully understand our benefits and rules. If you have any questions, you can call and speak to a Member Services Representative at 1-877-672-8620 (TTY 711), daily from 8 a.m. to 8 p.m. local time.

Understanding the Benefits



The Evidence of Coverage (EOC) provides a complete list of all coverage and services. It is important to review plan coverage, costs, and benefits before you enroll. Visit atriohp.com or call 1-877-672-8620 (TTY 711) daily from 8 a.m. to 8 p.m. local time to view a copy of the EOC.



Review the Provider Directory (or ask your doctor) to make sure the doctors you see now are in the network. If they are not listed, it means you will likely have to select a new doctor.



If you choose a plan that includes drug coverage, review the Pharmacy Directory to make sure the pharmacy you use for any prescription medicine is in the network. If the pharmacy is not listed, you will likely have to select a new pharmacy for your prescriptions.



Review the formulary to make sure your drugs are covered.

Understanding Important Rules



In addition to your monthly plan premium (if applicable), you must continue to pay your Medicare Part B premium. This premium is normally taken out of your Social Security check each month.



Benefits, premiums and/or copayments/coinsurance may change on January 1 of each year.



ATRIO PPO plans allow you to see providers outside of our network (non-contracted providers), while our HMO plans you will only have coverage for in-network providers. However, while we will pay for covered services provided by a non-contracted provider, the provider must agree to treat you. Except in an emergency or urgent situation, non-contracted providers may deny care. In addition, you may pay a higher copay for services received by non-contracted providers.

Scope of Sales Appointment Confirmation

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product(s) you want the agent to discuss	
	Medicare Advantage Plans (further indicate below with initials)
	Stand-alone Medicare Prescription Drug Plans
	Dental/Vision/Hearing Products
	Critical Illness and Accident Products
	Medicare Supplement (Medigap) Products
<input style="width: 20px; height: 20px;" type="checkbox"/>	Medicare Preferred Provider Organization (PPO) Plan: A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals but you can also use out-of-network providers, usually at a higher cost.
<input style="width: 20px; height: 20px;" type="checkbox"/>	Medicare Health Maintenance Organization (HMO): A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you can only get your care from doctors or hospitals in the plan's network (except in emergencies).
<input style="width: 20px; height: 20px;" type="checkbox"/>	Medicare Special Needs Plan (SNP): A Medicare Advantage Plan that has a benefit package designed for people with special health care needs. Examples of the specific groups served include people who have both Medicare and Medicaid, people who reside in nursing homes, and people who have certain chronic medical conditions.
<input style="width: 20px; height: 20px;" type="checkbox"/>	Medicare Prescription Drug Plan (PDP): A stand-alone drug plan that adds prescription drug coverage to Original Medicare, some Medicare Cost Plans, some Medicare Private-Fee-for-Service Plans, and Medicare Medical Savings Account Plans.
<input style="width: 20px; height: 20px;" type="checkbox"/>	Medicare Private Fee-For-Service (PFFS) Plan: A Medicare Advantage Plan in which you may go to any Medicare-approved doctor, hospital and provider that accepts the plan's payment, terms and conditions and agrees to treat you – not all providers will. If you join a PFFS Plan that has a network, you can see any of the network providers who have agreed to always treat plan members. You will usually pay more to see out-of-network providers.
<input style="width: 20px; height: 20px;" type="checkbox"/>	Medicare Medical Savings Account (MSA) Plan: MSA Plans combine a high deductible health plan with a bank account. The plan deposits money from Medicare into the account. You can use it to pay your medical expenses until your deductible is met.
<input style="width: 20px; height: 20px;" type="checkbox"/>	Medicare Cost Plan: In a Medicare Cost Plan, you can go to providers both in and out of network. If you get services outside of the plan's network, your Medicare-covered services will be paid for under Original Medicare but you will be responsible for Medicare coinsurance and deductibles.

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed.

- The person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan.
- Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

Beneficiary or Authorized Representative Signature and Signature Date:

SIGNED: _____ **DATE:** _____

If you are the authorized representative, please sign above and print below:

Representative's Name: _____

Your Relationship to the Beneficiary: _____

TO BE COMPLETED BY AGENT

Agent Name:	Agent Phone:
Beneficiary Name:	Beneficiary Phone (Optional):
Beneficiary Address (Optional):	
Initial Method of Contact:	
Agent's Signature:	
Plan(s) the Agent Represented During this Meeting:	
Date Appointment Completed	
[Plan Use Only]	

*Scope of Appointment documentation is subject to CMS record retention requirements *

Agent: Please Note - If the beneficiary signed the form at the time of appointment, provide explanation why SOA was not documented prior to meeting:

2027

MEDICARE ADVANTAGE & MEDICARE ADVANTAGE PRESCRIPTION DRUG ENROLLMENT FORM (KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



Who can use this form?

People with Medicare who want to join a Medicare Advantage Plan. To join a plan, you must:

- Be a United States citizen or be lawfully present in the U.S.
- Live in the plan's service area

Important: To join a Medicare Advantage Plan, you must also have both:

- Medicare Part A (Hospital Insurance)
- Medicare Part B (Medical Insurance)

When do I use this form?

You can join a plan:

- Between October 15 -December 7 each year (for coverage starting January 1)
- Within 3 months of first getting Medicare
- In certain situations where you're allowed to join or switch plans

Visit Medicare.gov to learn more about when you can sign up for a plan.

Individuals experiencing homelessness

If you want to join a plan but have no permanent residence, a Post Office Box, an address of a shelter or clinic, or the address where you receive mail (e.g., social security checks) may be considered your permanent residence address.

Note: You must complete all items in Section 1. The items in Section 2 are optional - you can't be denied coverage because you don't fill them out.

Reminders:

- If you want to join a plan during fall open enrollment (October 15–December 7), the plan must get your completed form by December 7.
- Your plan will send you a bill for the plan's premium. You can choose to sign up to have your premium payments deducted from your bank account or your monthly Social Security (or Railroad Retirement Board) benefit.

What happens next?

Send your completed and signed form to:

Mail: ATRIO Health Plans Fax: (602) 975-4071
338 Jericho Turnpike #135
Syosset, NY 11791

Once they process your request to join, they'll contact you.

How do I get help with this form?

Call ATRIO Health Plans at 1-877-672-8620 (TTY 711)

Or, call Medicare at 1-800-MEDICARE (1-800-633-4227). TTY users can call 1-877-486-2048.

En español: Llame a ATRIO Health Plans al 1-877-672-8620 (TTY 711) o a Medicare gratis al 1-800-633-4227 y oprima el 8 para asistencia en español y un representante estará disponible para asistirle.

What do I need to complete this form?

- Your Medicare Number (the number on your red, white, and blue Medicare card)
- Your permanent address and phone number

OMB No. 0938-1378

Expires: 2/28/2029

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-1378. The time required to complete this information is estimated to average 20 minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

IMPORTANT

Do not send this form or any items with your personal information (such as claims, payments, medical records, etc.) to the PRA Reports Clearance Office. Any items we get that aren't about how to improve this form or its collection burden (outlined in OMB 0938-1378) will be destroyed. It will not be kept, reviewed, or forwarded to the plan. See "What happens next?" on this page to send your completed form to the plan.

2027

**MEDICARE ADVANTAGE & MEDICARE ADVANTAGE
PRESCRIPTION DRUG ENROLLMENT FORM**
(KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



Section 1: All fields on this page are required (unless marked optional)

SELECT THE PLAN YOU WANT TO JOIN:

Douglas County	Klamath County
☐ ATRIO Special Needs Plan (HMO D-SNP): \$0 / mo. (H3814-030)	☐ ATRIO Special Needs Plan (HMO D-SNP): \$0 / mo. (H3814-007)

First Name: _____ **Last Name:** _____ **Middle Initial:** _____
(Optional)

Birth Date: _____ **Sex:** ☐ M ☐ F **Home Phone Number:** _____
(MM / DD / YYYY)

Cell Phone Number: _____ **Email:** _____

Please know that by providing your email address, you are agreeing to receive email notifications from us, and by providing your cell phone number, you are agreeing to receive text message notifications from us, as applicable. We will always give you the opportunity to opt-out of future communications.

Permanent Physical Address:(Do NOT enter a PO Box)

Street Address: _____ **Apt. #:** _____

City: _____ **County:** _____ **State:** _____ **Zip Code:** _____

Mailing Address: (If different from your permanent residence address (PO Box allowed)):

Street Address: _____ **Apt. #:** _____

City: _____ **County:** _____ **State:** _____ **Zip Code:** _____

Your Medicare information

Please take out your red, white, and blue Medicare card to complete this section.

Fill out this information as it appears on your Medicare card –OR– attach a copy of your Medicare card from your letter from Social Security or the Railroad Retirement Board

Medicare Number: _____
(Example: 1234-123-1234)

Hospital (Part A) Effective Date: _____

Medical (Part B) Effective Date: _____

**You must have Medicare
Part A or Part B (or
both) to join a Medicare
Prescription Drug Plan.**

2027

MEDICARE ADVANTAGE & MEDICARE ADVANTAGE PRESCRIPTION DRUG ENROLLMENT FORM (KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



Paying your plan premiums

You can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail, Electronic Funds Transfer (EFT), credit card, over the phone or on our website each month. You can also choose to pay your premium by having it automatically taken out of your Social Security or Railroad Retirement Board (RRB) benefit each month.

If you have to pay a Part D-Income Related Monthly Adjustment Amount (Part D-IRMAA), you must pay this extra amount in addition to your plan premium. The amount is usually taken out of your Social Security benefit, or you may get a bill from Medicare (or the RRB). DO NOT pay ATRIO Health Plans the Part D-IRMAA.

People with limited incomes may qualify for Extra Help to pay for their prescription drug costs. If you qualify, Medicare could pay for 75% or more of your drug costs including monthly prescription drug premiums, annual deductibles, and coinsurance. Additionally, those who qualify won't have a coverage gap or a late enrollment penalty. Even if you have Extra Help now you may need to reapply for recertification. Many people are eligible for these savings and don't even know it. For more information about this Extra Help, contact your local Social Security office, or call Social Security at 1-800-772-1213. TTY users should call 1-800-325-0778. You can also apply for Extra Help online at www.socialsecurity.gov/prescriptionhelp. If you qualify for Extra Help with your Medicare prescription drug coverage costs, Medicare will pay all or part of your plan premium. If Medicare pays only a portion of this premium, we will bill you for the amount that Medicare does not cover. If you don't Select a payment option, you will receive a bill/invoice each month.

Please select a payment option and follow any further instructions for full set-up:

- ☐ Receive a bill/invoice monthly
- ☐ Automatic Electronic Funds Transfer (EFT) from your bank account –for EFT, visit atriohp.com to sign up on our premium portal
- ☐ Credit Card –for credit card payment, visit atriohp.com to sign up on our premium portal
- ☐ Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check. I get my benefits from: ☐ Social Security ☐ Railroad Retirement Board

(The Social Security/RRB deduction may take two or more months to begin after Social Security or RRB approves the deduction. In most cases, if Social Security or RRB accepts your request for automatic deduction, the first deduction from your Social Security or RRB benefit check will include all premiums due from your enrollment effective date up to the point withholding begins. If Social Security or RRB does not approve your request for automatic deduction or approves deductions to begin after the enrollment effective date, we will send you a bill for your monthly premiums.)

IMPORTANT: Read and Sign Below

- I must keep both Hospital (Part A) and Medical (Part B) to stay in this plan. I must keep paying my Part B premium if I have one, unless Medicaid or someone else pays for it
- By joining this Medicare Advantage Plan, I acknowledge that ATRIO Health Plans will share my information with Medicare, who may use it to track my enrollment, to make payments, and for other purposes allowed by Federal law that authorize the collection of this information (see Privacy Act Statement below)
- I understand that I can be enrolled in only one MA or Part D plan at a time –and that enrollment in this plan will automatically end my enrollment in another MA or Part D plan (exceptions apply for MA PFFS, MA MSA plans)

2027

MEDICARE ADVANTAGE & MEDICARE ADVANTAGE PRESCRIPTION DRUG ENROLLMENT FORM (KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



- I understand that when my ATRIO coverage begins, I must get all of my medical and prescription drug benefits (If I selected a plan with prescription drug coverage) from ATRIO. Benefits and services provided by ATRIO and contained in my ATRIO "Evidence of Coverage" document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor ATRIO will pay for benefits or services that are not covered.
- The information on this enrollment form is correct to the best of my knowledge. I understand that if I intentionally provide false information on this form, I will be disenrolled from the plan.
- I understand that my signature (or the signature of the person legally authorized to act on my behalf) on this application means that I have read and understand the contents of this application. If signed by an authorized representative, this signature certifies that:
 1. This person is authorized under State law to complete this enrollment, and
 2. Documentation of this authority is available upon request by Medicare

Signature: _____ Today's Date: _____

For individuals helping enrollee with completing this form only

Complete this section if you're an individual (i.e. Agents, brokers, SHIP counselors, family members or other third parties? Helping an enrollee fill out this form.

Name: _____ Signature: _____

Relationship to Enrollee: ☐ Agent ☐ Broker ☐ SHIP counselor ☐ Authorized representative

National Producer Number (Agents/ Brokers only): _____

Are you enrolled in your State Medicaid program? ☐ Yes ☐ No

If yes, please provide your Medicaid number: _____

Do you have other prescription drug or medical coverage (like group, VA, TRICARE) in addition to this plan? ☐ Yes ☐ No

If yes, please list your other coverage and your ID number for this coverage:

Name of other coverage: _____ Member number for this coverage: _____ Group number for this coverage: _____

2027

**MEDICARE ADVANTAGE & MEDICARE ADVANTAGE
PRESCRIPTION DRUG ENROLLMENT FORM**
(KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



SECTION 2: A few questions to help us manage your plan (optional). Answering these questions is your choice. You can't be denied coverage because you don't fill them out.

List your Primary Care Physician (PCP), clinic or health center: _____

Select one if you prefer plan information in another language or an accessible format:

- | | |
|--------------------------------------|-----------------------------------|
| ☐ Spanish | ☐ Audio CD |
| ☐ Braille | ☐ Data CD |
| ☐ Large Print | |

Please contact ATRIO at 1-877-672-8620 (TTY 711) if you need information in an accessible format other than what is listed above. Our office hours are daily, 8:00 a.m. to 8:00 p.m. local time.

Do you or your spouse work? ☐ YES ☐ NO

2027

**MEDICARE ADVANTAGE & MEDICARE ADVANTAGE
PRESCRIPTION DRUG ENROLLMENT FORM**
(KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



SECTION 3: For licensed sales representative / agency use only

Staff member/ Agent/ Broker must complete:

Name (if assisted in enrollment):

Initial receipt date:

Writing ID #:

Proposed effective date of coverage:

- | | |
|--|--|
| ☐ AEP (Oct 15 –Dec 7) | ☐ SEP (Chronic) |
| ☐ ICEP (MA enrollees) | ☐ SEP (Dual LIS change of status) |
| ☐ IEP (MA-PD enrollees) | ☐ SEP (Dual LIS maintaining) |
| ☐ IEP (MA-PD enrollees eligible for 2ndIEP) | ☐ SEP (Loss of EGHP coverage) |
| ☐ OEP (Jan 1 –March 31) | ☐ SEP (Change in residence) |
| ☐ OEP (newly eligible) | ☐ SEP (SEP reason):_____ |
| ☐ OEPI | |

Licensed Sales Representative Signature (*optional*)

Date

Mail or fax this completed form to:

ATRIO Health Plans
338 Jericho Turnpike #135
Syosset, NY 11791
Fax: (602) 975-4071

PRIVACY ACT STATEMENT

The Centers for Medicare & Medicaid Services (CMS) collects information from Medicare plans to track beneficiary enrollment in Medicare Advantage (MA) Plans, improve care, and for the payment of Medicare benefits. Sections 1851 and 1860D-1 of the Social Security Act and 42 CFR §§ 422.50 and 422.60 authorize the collection of this information. CMS may use, disclose and exchange enrollment data from Medicare beneficiaries as specified in the System of Records Notice (SORN) "Medicare Advantage Prescription Drug (MARx)", System No. 09-70-0588. Your response to this form is voluntary. However, failure to respond may affect enrollment in the plan.



Attestation of Eligibility for an Enrollment Period

Typically, you may enroll in a Medicare Advantage plan only during the annual enrollment period from October 15 through December 7 of each year. There are exceptions that may allow you to enroll in a Medicare Advantage plan outside of this period.

Please read the following statements carefully and check the box if the statement applies to you. By checking any of the following boxes you are certifying that, to the best of your knowledge, you are eligible for an Enrollment Period. If we later determine that this information is incorrect, you may be disenrolled.

- ☐ I am new to Medicare.
- ☐ I am enrolled in a Medicare Advantage plan and want to make a change during the Medicare Advantage Open Enrollment Period (MA OEP).
- ☐ I recently moved outside of the service area for my current plan or I recently moved and have new options available to me. I moved on (insert date) _____.
- ☐ I recently was released from incarceration. I was released on (insert date) _____.
- ☐ I recently returned to the United States after living permanently outside of the U.S. I returned to the U.S. on (insert date) _____.
- ☐ I recently obtained lawful presence status in the United States. I got this status on (insert date) _____.
- ☐ I recently had a change in my Medicaid (newly got Medicaid, had a change in level of Medicaid assistance, or lost Medicaid) on (insert date) _____.
- ☐ I recently had a change in my Extra Help paying for Medicare prescription drug coverage (newly got Extra Help, had a change in the level of Extra Help, or lost Extra Help) on (insert date) _____.
- ☐ I have Medicare and get full Medicaid benefits. I want to join or switch to a plan that coordinates coverage between my Medicare and Medicaid managed care plans (called an integrated Dual Eligible Special Needs Plan (D-SNP)).
- ☐ I am moving into, live in, or recently moved out of a Long-Term Care Facility (for example, a nursing home or long term care facility). I moved/will move into/out of the facility on (insert date) _____.
- ☐ I recently left a PACE program on (insert date) _____.
- ☐ I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on (insert date) _____.
- ☐ I am leaving employer or union coverage on (insert date) _____.
- ☐ I'm in a qualified State Pharmaceutical Assistance Program, or I'm losing help from a State Pharmaceutical Assistance Program.
- ☐ My plan is ending its contract with Medicare, or Medicare is ending its contract with my plan.

- ☐ I was enrolled in a plan by Medicare (or my state) and I want to choose a different plan. My enrollment in that plan started on (insert date)
- ☐ I was enrolled in a Special Needs Plan (SNP) but I have lost the special needs qualification required to be in that plan. I was disenrolled from the SNP on (insert date) _____.
- ☐ I was affected by an emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA) or by a Federal, state or local government entity. One of the other statements here applied to me, but I was unable to make my enrollment request because of the disaster.

If none of these statements applies to you or you're not sure, please contact ATRIO Health Plans at 877-672-8620 (TTY 711) to see if you are eligible to enroll. We are open daily, 8:00 a.m. - 8:00 p.m.

Scope of Sales Appointment Confirmation

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product(s) you want the agent to discuss	
☐	Medicare Advantage Plans (further indicate below with initials)
☐	Stand-alone Medicare Prescription Drug Plans
☐	Dental/Vision/Hearing Products
☐	Critical Illness and Accident Products
☐	Medicare Supplement (Medigap) Products
☐	Medicare Preferred Provider Organization (PPO) Plan: A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals but you can also use out-of-network providers, usually at a higher cost.
☐	Medicare Health Maintenance Organization (HMO): A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you can only get your care from doctors or hospitals in the plan's network (except in emergencies).
☐	Medicare Special Needs Plan (SNP): A Medicare Advantage Plan that has a benefit package designed for people with special health care needs. Examples of the specific groups served include people who have both Medicare and Medicaid, people who reside in nursing homes, and people who have certain chronic medical conditions.
☐	Medicare Prescription Drug Plan (PDP): A stand-alone drug plan that adds prescription drug coverage to Original Medicare, some Medicare Cost Plans, some Medicare Private-Fee-for-Service Plans, and Medicare Medical Savings Account Plans.
☐	Medicare Private Fee-For-Service (PFFS) Plan: A Medicare Advantage Plan in which you may go to any Medicare-approved doctor, hospital and provider that accepts the plan's payment, terms and conditions and agrees to treat you – not all providers will. If you join a PFFS Plan that has a network, you can see any of the network providers who have agreed to always treat plan members. You will usually pay more to see out-of-network providers.
☐	Medicare Medical Savings Account (MSA) Plan: MSA Plans combine a high deductible health plan with a bank account. The plan deposits money from Medicare into the account. You can use it to pay your medical expenses until your deductible is met.
☐	Medicare Cost Plan: In a Medicare Cost Plan, you can go to providers both in and out of network. If you get services outside of the plan's network, your Medicare-covered services will be paid for under Original Medicare but you will be responsible for Medicare coinsurance and deductibles.

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed.

- The person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan.
- Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

Beneficiary or Authorized Representative Signature and Signature Date:

SIGNED: _____ **DATE:** _____

If you are the authorized representative, please sign above and print below:

Representative's Name: _____

Your Relationship to the Beneficiary: _____

TO BE COMPLETED BY AGENT

Agent Name:	Agent Phone:
Beneficiary Name:	Beneficiary Phone (Optional):
Beneficiary Address (Optional):	
Initial Method of Contact:	
Agent's Signature:	
Plan(s) the Agent Represented During this Meeting:	
Date Appointment Completed	
[Plan Use Only]	

*Scope of Appointment documentation is subject to CMS record retention requirements *

Agent: Please Note - If the beneficiary signed the form at the time of appointment, provide explanation why SOA was not documented prior to meeting:

2027

MEDICARE ADVANTAGE & MEDICARE ADVANTAGE PRESCRIPTION DRUG ENROLLMENT FORM (KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



Who can use this form?

People with Medicare who want to join a Medicare Advantage Plan. To join a plan, you must:

- Be a United States citizen or be lawfully present in the U.S.
- Live in the plan's service area

Important: To join a Medicare Advantage Plan, you must also have both:

- Medicare Part A (Hospital Insurance)
- Medicare Part B (Medical Insurance)

When do I use this form?

You can join a plan:

- Between October 15 -December 7 each year (for coverage starting January 1)
- Within 3 months of first getting Medicare
- In certain situations where you're allowed to join or switch plans

Visit Medicare.gov to learn more about when you can sign up for a plan.

Individuals experiencing homelessness

If you want to join a plan but have no permanent residence, a Post Office Box, an address of a shelter or clinic, or the address where you receive mail (e.g., social security checks) may be considered your permanent residence address.

Note: You must complete all items in Section 1. The items in Section 2 are optional - you can't be denied coverage because you don't fill them out.

Reminders:

- If you want to join a plan during fall open enrollment (October 15–December 7), the plan must get your completed form by December 7.
- Your plan will send you a bill for the plan's premium. You can choose to sign up to have your premium payments deducted from your bank account or your monthly Social Security (or Railroad Retirement Board) benefit.

What happens next?

Send your completed and signed form to:

Mail: ATRIO Health Plans Fax: (602) 975-4071
338 Jericho Turnpike #135
Syosset, NY 11791

Once they process your request to join, they'll contact you.

How do I get help with this form?

Call ATRIO Health Plans at 1-877-672-8620 (TTY 711)

Or, call Medicare at 1-800-MEDICARE (1-800-633-4227). TTY users can call 1-877-486-2048.

En español: Llamea ATRIO Health Plans al 1-877-672-8620 (TTY 711) o a Medicare gratis al 1-800-633-4227 y oprima el 8 para asistencia en español y un representante estará disponible para asistirle.

What do I need to complete this form?

- Your Medicare Number (the number on your red, white, and blue Medicare card)
- Your permanent address and phone number

OMB No. 0938-1378

Expires: 2/28/2029

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-1378. The time required to complete this information is estimated to average 20 minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

IMPORTANT

Do not send this form or any items with your personal information (such as claims, payments, medical records, etc.) to the PRA Reports Clearance Office. Any items we get that aren't about how to improve this form or its collection burden (outlined in OMB 0938-1378) will be destroyed. It will not be kept, reviewed, or forwarded to the plan. See "What happens next?" on this page to send your completed form to the plan.

2027

**MEDICARE ADVANTAGE & MEDICARE ADVANTAGE
PRESCRIPTION DRUG ENROLLMENT FORM**
(KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



Section 1: All fields on this page are required (unless marked optional)

SELECT THE PLAN YOU WANT TO JOIN:

Douglas County	Klamath County
☐ ATRIO Special Needs Plan (HMO D-SNP): \$0 / mo. (H3814-030)	☐ ATRIO Special Needs Plan (HMO D-SNP): \$0 / mo. (H3814-007)

First Name: _____ **Last Name:** _____ **Middle Initial:** _____
(Optional)

Birth Date: _____ **Sex:** ☐ M ☐ F **Home Phone Number:** _____
(MM / DD / YYYY)

Cell Phone Number: _____ **Email:** _____

Please know that by providing your email address, you are agreeing to receive email notifications from us, and by providing your cell phone number, you are agreeing to receive text message notifications from us, as applicable. We will always give you the opportunity to opt-out of future communications.

Permanent Physical Address:(Do NOT enter a PO Box)

Street Address: _____ **Apt. #:** _____

City: _____ **County:** _____ **State:** _____ **Zip Code:** _____

Mailing Address: (If different from your permanent residence address (PO Box allowed)):

Street Address: _____ **Apt. #:** _____

City: _____ **County:** _____ **State:** _____ **Zip Code:** _____

Your Medicare information

Please take out your red, white, and blue Medicare card to complete this section.

Fill out this information as it appears on your Medicare card –OR –attach a copy of your Medicare card from your letter from Social Security or the Railroad Retirement Board

Medicare Number: _____
(Example: 1234-123-1234)

Hospital (Part A) Effective Date: _____

Medical (Part B) Effective Date: _____

**You must have Medicare
Part A or Part B (or
both) to join a Medicare
Prescription Drug Plan.**

2027

MEDICARE ADVANTAGE & MEDICARE ADVANTAGE PRESCRIPTION DRUG ENROLLMENT FORM (KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



Paying your plan premiums

You can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail, Electronic Funds Transfer (EFT), credit card, over the phone or on our website each month. You can also choose to pay your premium by having it automatically taken out of your Social Security or Railroad Retirement Board (RRB) benefit each month.

If you have to pay a Part D-Income Related Monthly Adjustment Amount (Part D-IRMAA), you must pay this extra amount in addition to your plan premium. The amount is usually taken out of your Social Security benefit, or you may get a bill from Medicare (or the RRB). DO NOT pay ATRIO Health Plans the Part D-IRMAA.

People with limited incomes may qualify for Extra Help to pay for their prescription drug costs. If you qualify, Medicare could pay for 75% or more of your drug costs including monthly prescription drug premiums, annual deductibles, and coinsurance. Additionally, those who qualify won't have a coverage gap or a late enrollment penalty. Even if you have Extra Help now you may need to reapply for recertification. Many people are eligible for these savings and don't even know it. For more information about this Extra Help, contact your local Social Security office, or call Social Security at 1-800-772-1213. TTY users should call 1-800-325-0778. You can also apply for Extra Help online at www.socialsecurity.gov/prescriptionhelp. If you qualify for Extra Help with your Medicare prescription drug coverage costs, Medicare will pay all or part of your plan premium. If Medicare pays only a portion of this premium, we will bill you for the amount that Medicare does not cover. If you don't select a payment option, you will receive a bill/invoice each month.

Please select a payment option and follow any further instructions for full set-up:

- ☐ Receive a bill/invoice monthly
- ☐ Automatic Electronic Funds Transfer (EFT) from your bank account –for EFT, visit atriohp.com to sign up on our premium portal
- ☐ Credit Card –for credit card payment, visit atriohp.com to sign up on our premium portal
- ☐ Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check. I get my benefits from: ☐ Social Security ☐ Railroad Retirement Board

(The Social Security/RRB deduction may take two or more months to begin after Social Security or RRB approves the deduction. In most cases, if Social Security or RRB accepts your request for automatic deduction, the first deduction from your Social Security or RRB benefit check will include all premiums due from your enrollment effective date up to the point withholding begins. If Social Security or RRB does not approve your request for automatic deduction or approves deductions to begin after the enrollment effective date, we will send you a bill for your monthly premiums.)

IMPORTANT: Read and Sign Below

- I must keep both Hospital (Part A) and Medical (Part B) to stay in this plan. I must keep paying my Part B premium if I have one, unless Medicaid or someone else pays for it
- By joining this Medicare Advantage Plan, I acknowledge that ATRIO Health Plans will share my information with Medicare, who may use it to track my enrollment, to make payments, and for other purposes allowed by Federal law that authorize the collection of this information (see Privacy Act Statement below)
- I understand that I can be enrolled in only one MA or Part D plan at a time –and that enrollment in this plan will automatically end my enrollment in another MA or Part D plan (exceptions apply for MA PFFS, MA MSA plans)

2027

MEDICARE ADVANTAGE & MEDICARE ADVANTAGE PRESCRIPTION DRUG ENROLLMENT FORM (KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



- I understand that when my ATRIO coverage begins, I must get all of my medical and prescription drug benefits (If I selected a plan with prescription drug coverage) from ATRIO. Benefits and services provided by ATRIO and contained in my ATRIO “Evidence of Coverage” document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor ATRIO will pay for benefits or services that are not covered.
- The information on this enrollment form is correct to the best of my knowledge. I understand that if I intentionally provide false information on this form, I will be disenrolled from the plan.
- I understand that my signature (or the signature of the person legally authorized to act on my behalf) on this application means that I have read and understand the contents of this application. If signed by an authorized representative, this signature certifies that:
 1. This person is authorized under State law to complete this enrollment, and
 2. Documentation of this authority is available upon request by Medicare

Signature: _____ Today's Date: _____

For individuals helping enrollee with completing this form only

Complete this section if you're an individual (i.e. Agents, brokers, SHIP counselors, family members or other third parties? Helping an enrollee fill out this form.

Name: _____ Signature: _____

Relationship to Enrollee: ☐ Agent ☐ Broker ☐ SHIP counselor ☐ Authorized representative

National Producer Number (Agents/ Brokers only): _____

Are you enrolled in your State Medicaid program? ☐ Yes ☐ No

If yes, please provide your Medicaid number: _____

Do you have other prescription drug or medical coverage (like group, VA, TRICARE) in addition to this plan? ☐ Yes ☐ No

If yes, please list your other coverage and your ID number for this coverage:

Name of other coverage: _____ Member number for this coverage: _____ Group number for this coverage: _____

2027

**MEDICARE ADVANTAGE & MEDICARE ADVANTAGE
PRESCRIPTION DRUG ENROLLMENT FORM**
(KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



SECTION 2: A few questions to help us manage your plan (optional). Answering these questions is your choice. You can't be denied coverage because you don't fill them out.

List your Primary Care Physician (PCP), clinic or health center: _____

Select one if you prefer plan information in another language or an accessible format:

- | | |
|--------------------------------------|-----------------------------------|
| ☐ Spanish | ☐ Audio CD |
| ☐ Braille | ☐ Data CD |
| ☐ Large Print | |

Please contact ATRIO at 1-877-672-8620 (TTY 711) if you need information in an accessible format other than what is listed above. Our office hours are daily, 8:00 a.m. to 8:00 p.m. local time.

Do you or your spouse work? ☐ YES ☐ NO

2027

**MEDICARE ADVANTAGE & MEDICARE ADVANTAGE
PRESCRIPTION DRUG ENROLLMENT FORM**
(KLAMATH & DOUGLAS COUNTY DUAL ELIGIBLE SPECIAL NEEDS PLANS)



SECTION 3: For licensed sales representative / agency use only

Staff member/ Agent/ Broker must complete:

Name (if assisted in enrollment):

Initial receipt date:

Writing ID #:

Proposed effective date of coverage:

- | | |
|--|--|
| ☐ AEP (Oct 15 –Dec 7) | ☐ SEP (Chronic) |
| ☐ ICEP (MA enrollees) | ☐ SEP (Dual LIS change of status) |
| ☐ IEP (MA-PD enrollees) | ☐ SEP (Dual LIS maintaining) |
| ☐ IEP (MA-PD enrollees eligible for 2ndIEP) | ☐ SEP (Loss of EGHP coverage) |
| ☐ OEP (Jan 1 –March 31) | ☐ SEP (Change in residence) |
| ☐ OEP (newly eligible) | ☐ SEP (SEP reason):_____ |
| ☐ OEPI | |

Licensed Sales Representative Signature (*optional*)

Date

Mail or fax this completed form to:

**ATRIO Health Plans
338 Jericho Turnpike #135
Syosset, NY 11791
Fax: (602) 975-4071**

PRIVACY ACT STATEMENT

The Centers for Medicare & Medicaid Services (CMS) collects information from Medicare plans to track beneficiary enrollment in Medicare Advantage (MA) Plans, improve care, and for the payment of Medicare benefits. Sections 1851 and 1860D-1 of the Social Security Act and 42 CFR §§ 422.50 and 422.60 authorize the collection of this information. CMS may use, disclose and exchange enrollment data from Medicare beneficiaries as specified in the System of Records Notice (SORN) "Medicare Advantage Prescription Drug (MARx)", System No. 09-70-0588. Your response to this form is voluntary. However, failure to respond may affect enrollment in the plan.



Attestation of Eligibility for an Enrollment Period

Typically, you may enroll in a Medicare Advantage plan only during the annual enrollment period from October 15 through December 7 of each year. There are exceptions that may allow you to enroll in a Medicare Advantage plan outside of this period.

Please read the following statements carefully and check the box if the statement applies to you. By checking any of the following boxes you are certifying that, to the best of your knowledge, you are eligible for an Enrollment Period. If we later determine that this information is incorrect, you may be disenrolled.

- ☐ I am new to Medicare.
- ☐ I am enrolled in a Medicare Advantage plan and want to make a change during the Medicare Advantage Open Enrollment Period (MA OEP).
- ☐ I recently moved outside of the service area for my current plan or I recently moved and have new options available to me. I moved on (insert date) _____.
- ☐ I recently was released from incarceration. I was released on (insert date) _____.
- ☐ I recently returned to the United States after living permanently outside of the U.S. I returned to the U.S. on (insert date) _____.
- ☐ I recently obtained lawful presence status in the United States. I got this status on (insert date) _____.
- ☐ I recently had a change in my Medicaid (newly got Medicaid, had a change in level of Medicaid assistance, or lost Medicaid) on (insert date) _____.
- ☐ I recently had a change in my Extra Help paying for Medicare prescription drug coverage (newly got Extra Help, had a change in the level of Extra Help, or lost Extra Help) on (insert date) _____.
- ☐ I have Medicare and get full Medicaid benefits. I want to join or switch to a plan that coordinates coverage between my Medicare and Medicaid managed care plans (called an integrated Dual Eligible Special Needs Plan (D-SNP)).
- ☐ I am moving into, live in, or recently moved out of a Long-Term Care Facility (for example, a nursing home or long term care facility). I moved/will move into/out of the facility on (insert date) _____.
- ☐ I recently left a PACE program on (insert date) _____.
- ☐ I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on (insert date) _____.
- ☐ I am leaving employer or union coverage on (insert date) _____.
- ☐ I'm in a qualified State Pharmaceutical Assistance Program, or I'm losing help from a State Pharmaceutical Assistance Program.
- ☐ My plan is ending its contract with Medicare, or Medicare is ending its contract with my plan.

- ☐ I was enrolled in a plan by Medicare (or my state) and I want to choose a different plan. My enrollment in that plan started on (insert date)
- ☐ I was enrolled in a Special Needs Plan (SNP) but I have lost the special needs qualification required to be in that plan. I was disenrolled from the SNP on (insert date) _____.
- ☐ I was affected by an emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA) or by a Federal, state or local government entity. One of the other statements here applied to me, but I was unable to make my enrollment request because of the disaster.

If none of these statements applies to you or you're not sure, please contact ATRIO Health Plans at 877-672-8620 (TTY 711) to see if you are eligible to enroll. We are open daily, 8:00 a.m. - 8:00 p.m.



Plan Recap

We want to make sure you know what to expect with the new plan you've chosen. Please fill out this plan recap with your Licensed Sales Representative (if applicable).

Plan Information

My new plan is a:

- ☐ Medicare Advantage plan (*No prescription drug coverage*)
- ☐ Medicare Advantage Prescription Drug Plan
- ☐ Medicare Advantage Special Needs Plan

The name of my new plan is: _____

My plan type is a (circle one): PPO or PPO C-SNP or HMO D-SNP

- My plan type:**
- ☐ Requires referrals
 - ☐ Does not require referrals
 - ☐ Includes a medical deductible unless the state or another third party pays it for me
 - ☐ Does not include a medical deductible

My plan will provide:

- ☐ All Medicare health coverage
- ☐ All Medicare prescription drug coverage

I must live in the plan's service area, which is _____. If I move out of the plan's service area for more than 6 months in a row, I will need to choose a new plan.

Premium Information

My plan has a premium ☐ Yes ☐ No If yes, my premium amount is \$ _____ monthly, which I must pay to stay in this plan. If I qualify for Extra Help, my premium may be less.* In addition, I must remain enrolled in Medicare Part A and Part B and must continue to pay my Medicare Part B premium, unless the state or another third party pays it for me. If I owe a Late Enrollment Penalty (LEP), it is not included in my premium. I will need to add it to my premium each month.

* *Extra Help is a program for people with limited incomes who need help paying Part D premiums, deductibles and copays. To see if you qualify for Extra Help, call:*

- The Social Security Administration at 1-800-772-1213, TTY 1-800-325-0778
- Your state Medicaid office

Network Provider Information

Understanding your network is important. With my plan, I can see any provider inside or outside the network nationwide that accepts Medicare. If I get my care from out-of-network providers, I may pay a higher out-of-pocket amount. ☐ Yes ☐ No

List the doctors and hospitals you use in this table. Be sure to note whether they are part of the ATRIO plan provider network or not. To find out if they are part of the plan network, please visit atriohp.com.

Provider Name	Provider Type (PCP/Specialist/Hospital)	Network (Yes/No)

Prescription Drug Coverage

My plan has a prescription drug deductible. ☐ Yes ☐ No

If I have a deductible, the amount is \$ _____ and it applies to drugs on Tier 3, Tier 4, and Tier 5 only.

List the medications you use in this table. Be sure to note their tier level, whether there are any limits on the drug, and if the prescription drug deductible applies.

Medication	Tier Level	Has Limits (Yes/No)	Deductible (Yes/No)

NOTE: My actual out of pocket costs may vary based on:

- The drug stage I am in
- The drug tier level
- The pharmacy I use (retail / mail-order)
- If I have Extra Help

Contact your Licensed Sales Representative

If I have questions about my plan, I will call my Licensed Sales Representative,
_____ at _____

or Member Services at 1-877-672-8620 (TTY 711) from 8 a.m. to 8 p.m. local time.

atriohp.com

What to Expect After You Enroll

Steps	How you get it	Description
1 Enrollment Verification	 Mailed	If you enrolled with an agent or broker, you will receive a letter to confirm you understand the type of plan you are enrolling in
2 Acknowledgement of Receipt of Completed Enrollment Form	 Mailed	Within 7 calendar days of Medicare's approval of enrollment, you will receive a letter stating we received your completed enrollment form, and that Medicare has approved your enrollment
3 Member ID Card	 Mailed	You will receive your member ID card within 10 days of your Medicare-approved enrollment
4 Premium Assistance	 Mailed	You may receive a letter on how to get extra help with your Medicare premiums and other health care costs, if you qualify
5 Review Benefits & Register Online	 Online	You can access benefit materials at atriohp.com. Optional: Once your coverage begins, register online for our member portal at atriohp.com so you can access additional benefit information

YOU *plus* ATRIO

For over 22 years we've been Oregon's local, dependable Medicare Advantage plan.

Learn more now.

atriohp.com

To enroll, call

1-888-201-8818 (TTY 711)

Member Services

1-877-672-8620 (TTY 711)

Daily from 8 a.m. to 8 p.m. local time

Messages received on holidays and outside of our business hours will be returned within one business day.