



Individual Enrollment Request Form to Enroll in a Medicare Advantage Plan (Part C)

Who can use this form?

People with Medicare who want to join a Medicare Advantage Plan or Medicare Prescription Drug 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](https://www.Medicare.gov) to learn more about when you can sign up for a plan.

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

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.

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-NEW. 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.

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:

Trillium Medicare Advantage
PO BOX 10420
Van Nuys, CA 91499-6208

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

How do I get help with this form?

Call Trillium Medicare Advantage at 1-877-826-5519. TTY users can call 711.

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

En español: Llame a Trillium Medicare Advantage al 1-877-826-5519 (TTY: 711) o a Medicare gratis al 1-800-633-4227 y oprima el 2 para asistencia en español y un representante estará disponible para asistirle.



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

Trillium Advantage Dual (HMO D-SNP)¹ H2174 – includes prescription drug coverage

001: Lane County, OR \$0-\$36.00* per month

¹You must meet specific enrollment criteria to enroll in this plan.

*Actual premium based on Low Income Subsidy status.



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

First name	Last name	Optional: Middle initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Birth date	Sex	Phone number
<input type="text"/> M M D D Y Y Y Y	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="text"/> - <input type="text"/> - <input type="text"/>

Permanent residence street address (Don't enter a PO Box)

City	Optional: County	State	ZIP code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Mailing address, if different from your permanent address (PO Box allowed)

Street address

City	State	ZIP code
<input type="text"/>	<input type="text"/>	<input type="text"/>

Your Medicare information:

Medicare Number	Is entitled to:	Effective date
<input type="text"/>	HOSPITAL (Part A)	<input type="text"/> M M D D Y Y Y Y
	MEDICAL (Part B)	<input type="text"/> M M D D Y Y Y Y

You must have Medicare Part A and Part B to join a Medicare Advantage plan.

Answer this important question:

Will you have other prescription drug coverage (like VA, TRICARE) in addition to Trillium Medicare Advantage?

Yes No

Name of other coverage

Member number for this coverage	Group number for this coverage
<input type="text"/>	<input type="text"/>



IMPORTANT: Read and sign below:

- I must keep both Hospital (Part A) and Medical (Part B) to stay in Trillium Medicare Advantage.
- By joining this Medicare Advantage Plan or Medicare Prescription Drug Plan, I acknowledge that Trillium Medicare Advantage 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).
- Your response to this form is voluntary. However, failure to respond may affect enrollment in the plan.
- 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 people with Medicare are generally not covered under Medicare while out of the country, except for limited coverage near the U.S. border.
- I understand that when my Trillium Medicare Advantage coverage begins, I must get all of my medical and prescription drug benefits from Trillium Medicare Advantage. Benefits and services provided by Trillium Medicare Advantage and contained in my Trillium Medicare Advantage “Evidence of Coverage” document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor Trillium Medicare Advantage will pay for benefits or services that are not covered.
- 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 (as described above), 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.

Today's date

M	M	D	D	Y	Y	Y	Y

Signature

If you're the authorized representative, sign above and fill out these fields:

Name

Address

Phone number

 - -

Relationship to enrollee



Section 2 – All fields on this page are optional

Answering these questions is your choice. You can't be denied coverage because you don't fill them out.

Select one if you want us to send you information in an accessible format.

Braille Large print Audio CD

Please contact Trillium Medicare Advantage at 1-844-867-1156 if you need information in an accessible format other than what's listed above. Our office hours are from October 1 to March 31, you can call us 7 days a week from 8 a.m. to 8 p.m. From April 1 to September 30, you can call us Monday through Friday from 8 a.m. to 8 p.m. A messaging system is used after hours, weekends and on federal holidays. TTY users can call 711.

1. Do you work? Yes No

2. Does your spouse work? Yes No

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

I want to get the following materials via email.

Select one or more.

Explanation of Coverage (EOC)

Send me a link to receive my benefit materials online

E-mail address:



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” 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). **DON'T** pay Trillium Medicare Advantage the Part D-IRMAA.

If you don't select a payment option, you will get a bill each month.

Please select a premium payment option:

- Get a bill
- Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check. I get monthly benefits from: Social Security RRB
- (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, we will send you a paper bill for your monthly premiums.)

PRIVACY ACT STATEMENT The Centers for Medicare & Medicaid Services (CMS) collects information from Medicare plans to track beneficiary enrollment in Medicare Advantage (MA) or Prescription Drug Plans (PDP), improve care, and for the payment of Medicare benefits. Sections 1851 and 1860D-1 of the Social Security Act and 42 CFR §§ 422.50, 422.60, 423.30 and 423.32 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.



OFFICE USE ONLY:

Name of staff member/agent/broker (if assisted in enrollment):

Plan ID #: **Effective date of coverage:**
M M D D Y Y Y Y

ICEP/IEP AEP SEP (type): Not eligible

Trillium Medicare Advantage sales representative/Authorized agent

(individual sales representative/agent who completed the application)

Agent type (select one): Authorized agent Trillium Medicare Advantage employee

Complete section below:

Sales rep/Agent name Sales rep/Agent NPN #

Agency/FMO affiliation: (if applicable) Agent ID#:

This information must match your approved Trillium Medicare Advantage licensing records.

Agent phone #: - -

Email **Agency/FMO phone #** (if applicable) - -

Sales representative/authorized agent application receipt date:
(Applications must be received at Trillium Medicare Advantage within 1 calendar day of this date.)
M M D D Y Y Y Y

Application receipt location: Appointment Sales event Walk-in
 Other (specify):

Provider information for HMO plans:

PCP name: PCP NPI:

PPG name: PPG ID:

Is PCP/PPG selected accepted for the plan chosen? Yes No

Current patient? Yes No

Broker Application Submissions: Sales representative/Agent must fax the Scope of Appointment and Enrollment Forms to 1-844-222-3180.



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 this plan is a new option for me. I moved on (insert date).

M	M	D	D	Y	Y	Y	Y
- I recently was released from incarceration. I was released on (insert date).

M	M	D	D	Y	Y	Y	Y
- I recently returned to the United States after living permanently outside of the U.S. I returned to the U.S. on (insert date).

M	M	D	D	Y	Y	Y	Y
- I recently obtained lawful presence status in the United States. I got this status on (insert date).

M	M	D	D	Y	Y	Y	Y
- 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).

M	M	D	D	Y	Y	Y	Y
- 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).

M	M	D	D	Y	Y	Y	Y
- I have both Medicare and Medicaid (or my state helps pay for my Medicare premiums) or I get *Extra Help* paying for my Medicare prescription drug coverage, but I haven't had a change.
- 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).

M	M	D	D	Y	Y	Y	Y
- I recently left a PACE program on (insert date).

M	M	D	D	Y	Y	Y	Y
- I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on (insert date).

M	M	D	D	Y	Y	Y	Y
- I am leaving employer or union coverage on (insert date).

M	M	D	D	Y	Y	Y	Y
- I belong to a pharmacy assistance program provided by my state.
- 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).

M	M	D	D	Y	Y	Y	Y

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).

M	M	D	D	Y	Y	Y	Y

I was affected by a weather-related emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA)). One of the other statements here applied to me, but I was unable to make my enrollment because of the natural disaster.

If none of these statements applies to you or you're not sure, please contact Trillium Medicare Advantage at 1-877-826-5519 (TTY users should call 711) to see if you are eligible to enroll. We are open from October 1 to March 31, you can call us 7 days a week from 8 a.m. to 8 p.m. From April 1 to September 30, you can call us Monday through Friday from 8 a.m. to 8 p.m. A messaging system is used after hours, weekends and on federal holidays.

You must continue to pay your Medicare Part B premium. However, for full-dual beneficiaries, the State will cover your Part B premium as long as you retain your Medicaid eligibility.

Trillium Medicare Advantage is contracted with Medicare for an HMO D-SNP plan, and with the state Medicaid program. Enrollment in Trillium Medicare Advantage depends on contract renewal.



Are you enrolling in a Medicare Advantage Dual Eligible Special Needs Plan (HMO D-SNP)?

You are eligible to enroll in a Medicare Advantage Dual Eligible Special Needs Plan (HMO D-SNP) if:

- You are entitled to Medicare Part A and enrolled in Medicare Part B. Members must continue to pay their Medicare Part B premium if not otherwise paid for under Medicaid or by another third party.
- You must be a United States citizen, or are lawfully present in the United States and permanently reside in the service area of the plan.
- For a HMO D-SNP Medicare Advantage plan, you must also be enrolled in the State Medicaid plan. Premiums, copays, coinsurance, and deductibles may vary based on your Medicaid eligibility category and/or the level of Extra Help you receive. Your Part B premium is paid by the State for full-dual enrollees.

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

If “Yes,” please provide your name and Medicaid number.

Name

Medicaid number

Please complete and submit this document with your enrollment application.

Allwell, Health Net and Trillium are contracted with Medicare for HMO D-SNP plans, and with some state Medicaid programs. Enrollment in Allwell, Health Net or Trillium depends on contract renewal.

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