



## Summit Health Medicare Advantage Plans

Individual enrollment election form

### 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](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 unless labeled as optional. If an item is labeled optional, you cannot be denied coverage for not filling it 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:  
Summit Health Plan, Inc.  
Attn: Medicare Membership Accounting  
601 SW 2nd Ave  
Portland, OR 97204-9748

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

### How do I get help with this form?

Call Summit Health Medicare Advantage at 1-844-931-1782. 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 Summit Health Medicare Advantage al 1-844-931-1782/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.

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.



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Summit Health Plan, Inc.  
 Attn: Medicare Membership Accounting  
 601 SW 2nd Ave | Portland, OR 97204-9748  
 541-663-2721 | 1-844-827-2355  
 TTY: 711 | Fax: 833-949-1891

To enroll in a Summit Health Medicare Advantage plan, please provide the following information:

Please check which plan you want to enroll in:				Please check the box if you would like to add the Optional supplemental benefit:
<input type="checkbox"/> Summit Health Core (HMO-POS) \$22.00 per month H2765-001  <i>This plan does not include Part D prescription drug coverage</i>	<input type="checkbox"/> Summit Health Value + Rx (HMO) \$69.00 per month H2765-002	<input type="checkbox"/> Summit Health Standard + Rx (HMO-POS) \$99.00 per month H2765-003	<input type="checkbox"/> Summit Health Premier + Rx (HMO-POS) \$140.00 per month H2765-004	<input type="checkbox"/> Summit Health Extra Care \$5.00 per month in addition to your Summit Health Medicare Advantage plan premium

Last name		First name		Middle initial (optional)	
Birth date (mm/dd/yyyy) ____ / ____ / ____		Sex <input type="checkbox"/> M <input type="checkbox"/> F	Home phone number ( ____ ) _____		Alternate telephone number (optional) ( ____ ) _____
Permanent residence street address (P.O. Box is not allowed)					
City		County (optional)		State	ZIP code
Mailing address (only if different from your permanent residence address)					
Street address					
City				State	ZIP code
Email address (optional):					

**Please provide your Medicare insurance information**

Medicare Number: \_\_\_\_\_

Hospital Part A effective date (optional): \_\_\_\_\_

Medical Part B effective date (optional): \_\_\_\_\_

Prescription Part D effective date (optional): \_\_\_\_\_

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

**How to pay your plan premium (Optional. You can decide now or later.)**

You can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail, eBill or “Electronic Funds Transfer” (EFT) 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 Summit Health Plan, Inc. the Part D-IRMAA. If you don't select a payment option now, you will get a bill each month.

Please select a premium payment option:

Get a monthly bill

Electronic funds transfer (EFT) from your bank account each month. Please enclose a **VOIDED** check or provide the following:

Account holder name: \_\_\_\_\_

Bank routing number: \_\_\_\_\_

Bank account number: \_\_\_\_\_

Account type:     Checking     Savings

eBill, online premium payment

*eBill is an online premium payment tool. When you receive your Summit Health member ID number, visit [yoursummithealth.com](http://yoursummithealth.com) and create your Member Dashboard. Once your Member Dashboard is created, click on the eBill tab to view and pay your monthly premium.*

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. How premium is collected for months prior to the start of withholding depends on when your application is received and the effective date of enrollment. In some cases, Social Security/RRB deducts for those months once withholding begins. It's important to note that this means premium for multiple months may be deducted from a single benefit check. In other cases, you will receive paper bills and be responsible to pay us directly for months prior to the start of withholding. If Social Security or RRB does not approve your request for automatic deduction, we will send you paper bills for your monthly premiums on an ongoing basis.)*

**Please read and answer these important questions:**

1. Some individuals may have other coverage, including other private insurance, TRICARE, Federal employee health benefits coverage, VA benefits or State pharmaceutical assistance programs. Will you have other coverage in addition to a Summit Health Medicare Advantage plan?  
 Yes  No *If "yes," please list your other coverage and your identification (ID) number(s) for this coverage.*  
Name of other coverage: \_\_\_\_\_  
Member number for this coverage: \_\_\_\_\_  
Group number for this coverage: \_\_\_\_\_  
Check all that apply:  
 Medical  Prescription  
 Dental  Vision
2. Are you enrolled in your State Medicaid program (optional)?  Yes  No  
*If "yes," please provide your Medicaid number:* \_\_\_\_\_
3. Do you or your spouse work (optional)?  Yes  No

Please choose the name of a Primary Care Provider (PCP), clinic or health center (optional):  
\_\_\_\_\_

Please check one of the boxes below if you would prefer us to send you information in a language other than English or in an accessible format (optional):  Large print  Spanish  Braille  Audio CD

Please contact Summit Health Medicare Advantage at 1-844-827-2355 if you need information in an accessible format or language other than what is listed above. Customer Service is available from 7 a.m. to 8 p.m., Pacific Time, seven days a week from Oct 1 through March 31 (after March 31, your call will be handled by our automated phone system Saturdays, Sundays and holidays).

**IMPORTANT: Please read and sign below:**

- I must keep both Hospital (Part A) and Medical (Part B) to stay in a Summit Health Medicare Advantage Plan.
- By joining this Medicare Advantage Plan, I acknowledge that Summit Health 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 PrivacyAct 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 Summit Health Medicare Advantage coverage begins, I must get all of my medical and prescription drug benefits from Summit Health Medicare Advantage. Benefits and services provided by Summit Health Medicare Advantage and contained in my Summit Health Medicare Advantage "Evidence of Coverage" document (also known as a member contract or subscriber agreement) will be covered. Neither Medicare nor Summit Health 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.

Signature: \_\_\_\_\_ Today's date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

*If you are the authorized representative, sign above and provide the following information:*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone number: ( \_\_\_\_\_ ) \_\_\_\_\_ Relationship to enrollee: \_\_\_\_\_

**Office use only:**

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

Plan ID #: \_\_\_\_\_ Effective Date of Coverage: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

ICEP/IEP: \_\_\_\_\_ AEP: \_\_\_\_\_ SEP (type): \_\_\_\_\_ Not Eligible: \_\_\_\_\_

*If you are an agent contracted with Summit Health Plan, Inc. you must provide the following,*

Agency: \_\_\_\_\_ Date enrollment form received by agent: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Telephonic enrollment intake by: \_\_\_\_\_

**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.



## Summit Health Medicare Advantage

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 am enrolling during the Annual Election Period (AEP), which takes place from October 15 to December 7 of each year.
- 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) \_\_\_\_ / \_\_\_\_ / \_\_\_\_.
- 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 effective date of change) \_\_\_\_ / \_\_\_\_ / \_\_\_\_.
- 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 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) \_\_\_\_ / \_\_\_\_ / \_\_\_\_.
- 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 belong to a pharmacy assistance program provided by my state.
- My plan is ending its contract with Medicare on (insert date) \_\_\_\_ / \_\_\_\_ / \_\_\_\_.
- Medicare is ending its contract with my plan on (insert date) \_\_\_\_ / \_\_\_\_ / \_\_\_\_.
- 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 Summit Health Medicare Advantage at 1-844-827-2355 (TTY users should call 711) to see if you are eligible to enroll.