



ATRIOTM
HEALTH PLANS

2023 *Benefit Company*



Annual Report

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OUR MISSION

ATRIO Health Plans fosters a culture of compassion, capability, and customer service. Our mission is to deliver high quality health insurance at a reasonable price, leverage the talents of our people, and foster deeper community connections.

*Local. Dependable. That's **ATRIO**.*



LEADERSHIP



Gregg Kimmer

President & CEO

At **ATRIO**, we recognize that we have a responsibility to our employees, members, and the communities we serve. We see this as a privilege, and we are proud to serve the most deserving population in America. Additionally, we are proud to be an active participant in Oregon and look forward to growing that community involvement moving forward.

The success of **ATRIO** relies upon the dedication to our communities, members and provider partners. One thing I've asked of our incredibly talented team is to understand the core reason we are here; we have to be obsessed with serving our members. My commitment is to never stop at this. **ATRIO Health Plans** was established by Oregon Physicians in 2004 and has since grown to serve thousands of members in Oregon and other new markets as we continue to expand. As we expand, we will focus on continuing the importance of being local to best serve people!

My thanks to our board, stakeholders, members, and amazing employees for allowing us to contribute in such meaningful ways.



Jeff Fox

Vice-Chairman

A Benefit Company is a designation by the state that a corporation is equally concerned with their impact on society and the environment as they are with their bottom line. We view our Benefit Company status as an opportunity for a continued positive impact on the communities we serve.

2023 BOARD OF DIRECTORS

Dr. Vance Vanier

Chairman
Chicago Pacific Founders

Jeff Fox

Vice-Chairman
ATRIO Health Plans

Brian McCarthy

Chicago Pacific Founders

Etienne Deffarges

Chicago Pacific Founders

Dr. Lloyd Minor

Public Member

Helena Lankton

Public Member

Jennifer Yeh

Public Member

Tayo Akins

Cascade Comprehensive Care

Our Employees

Our greatest asset is our employees. In 2023, **ATRIO Health Plans** increased our employees to 132 people, living and/or working in Oregon as well as remotely across the nation. Our community-based philosophy of establishing local offices in the communities we serve allows us to provide a highly personalized level of customer service. We offer the chance to work in a rewarding, team-oriented environment and are committed to providing our employees and their families with competitive pay and benefits, as well as ongoing professional development training opportunities to help our employees acquire or strengthen the skills needed to excel in their careers.

We value talent, experience, and a strong work ethic, but also place a premium on individuality, creative thinking, and a strong sense of community.

We are part of
the communities
we serve



WHO IS ATRIO HEALTH PLANS? ———

***ATRIO Health Plans** was established by Oregon physicians in 2004. Since then, **ATRIO** has grown to serve thousands of members in Oregon (Clackamas, Douglas, Josephine, Jackson, Klamath, Lane, Marion, Multnomah, Polk, Washington, and Yamhill counties) and Nevada (Carson City, Churchill, Douglas, Lyon, Storey, and Washoe counties). We offer Medicare Advantage Plans, Medicare Advantage Prescription Drug Plans, and Dual Special Needs Plans. We are proud to have achieved our membership growth through financially sound underwriting practices that result in competitively priced plans with comprehensive coverage.*

ATRIO Health Plans provides a general public benefit, including making Medicare Advantage health insurance coverage available to qualifying members of the communities that it serves (i.e., persons age 65 and older, persons with certain disabilities, and persons of all ages with kidney failure requiring dialysis or a kidney transplant).

Our company works closely with local healthcare providers to improve the well-being and health outcomes for our members. We are part of the communities we serve and are committed to delivering

a responsible and sustainable approach to achieving member satisfaction, cost savings, and long-term market growth.

ATRIO Health Plans is a registered Oregon Benefit Company, established pursuant to ORS 60.750 - ORS 60.770. A Benefit Company is a corporate status for companies that strive to make a positive impact on society and the environment, in addition to earning a profit. The Oregon statute gives clarity to the managers of a company that their fiduciary duty includes creation of a public benefit and consideration of non-financial interests.

LINES OF BUSINESS & SERVICE AREA

ATRIO

Freedom Medicare
Advantage Plan

ATRIO

Choice Rx Medicare
Advantage Prescription
Drug Plan

ATRIO

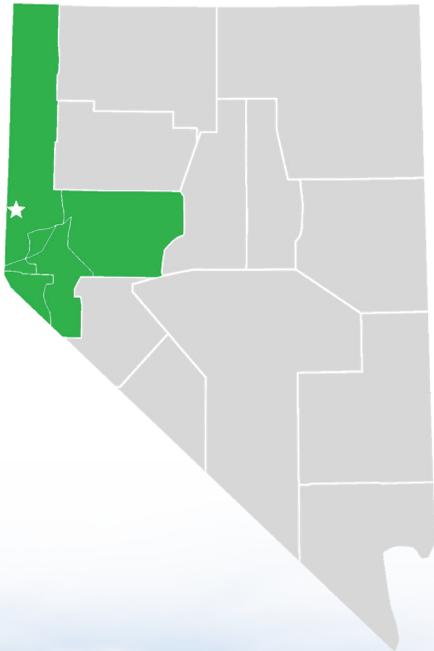
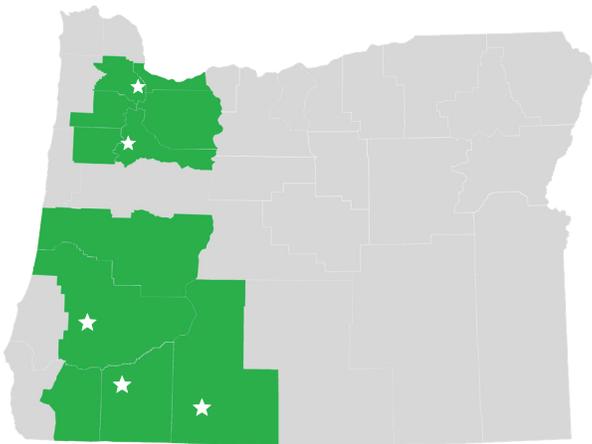
Select Rx Medicare
Advantage Prescription
Drug Plan

ATRIO

Prime Rx Medicare
Advantage Prescription
Drug Plan

ATRIO

Special Needs Plans

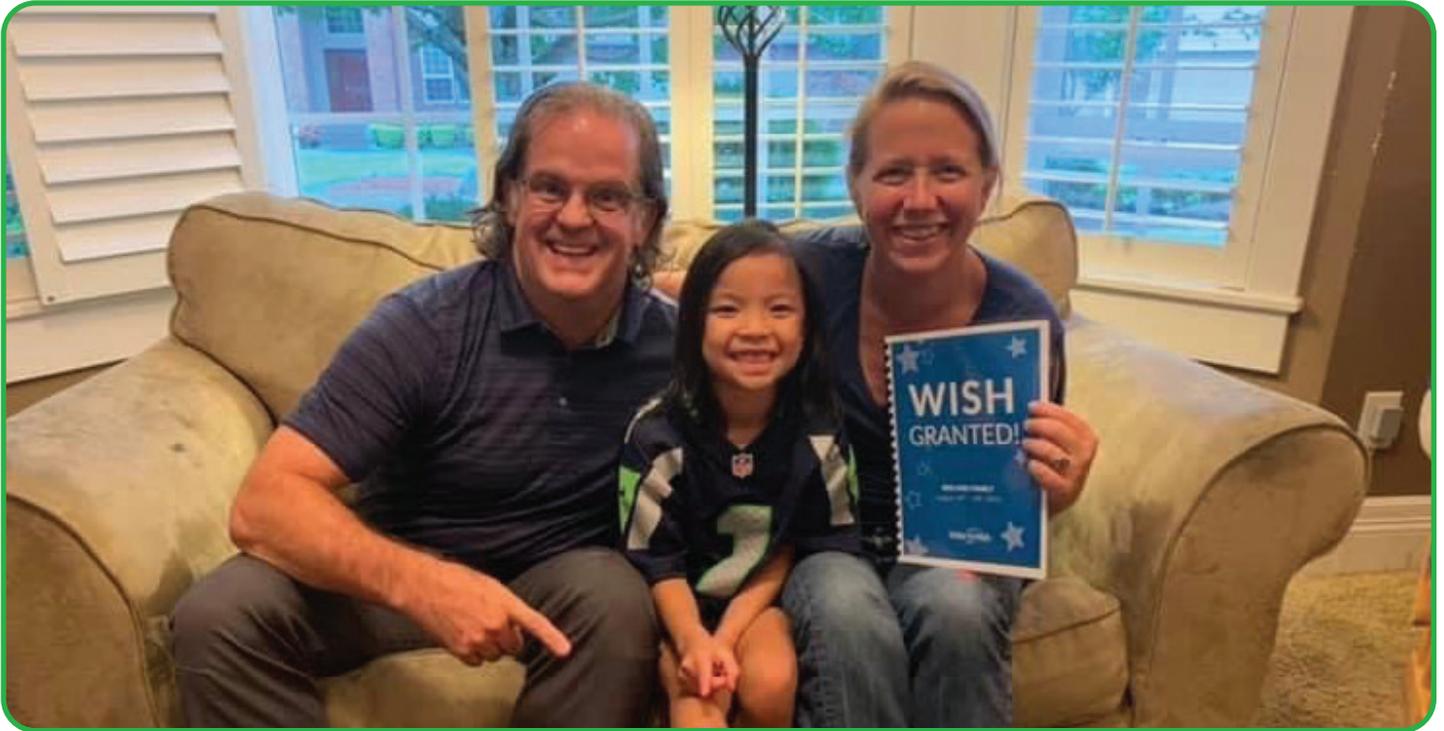


SERVICE AREA & MEMBERSHIP

ATRIO Health Plans currently serves Clackamas, Douglas, Jackson, Josephine, Klamath, Lane, Marion, Multnomah, Polk, Washington and Yamhill counties in Oregon, as well as Carson City, Churchill, Douglas, Lyon, Storey and Washoe counties in Nevada.

Not all lines of business are available in every county. The stars on the maps indicate our local office locations to serve our members.

COMMUNITY ENGAGEMENT



Wish Granted! This young girl's wish was granted to meet the Seattle Seahawks.

*Being better together begins with being involved in our communities. **ATRIO Health Plans** supports a variety of projects and charitable causes and has chosen to spotlight a worthy cause that embodies who we are as an organization.*

Make-a-Wish Oregon

For children diagnosed with critical illnesses, a wish come true can be a crucial turning point in their lives. A wish can be that spark that helps these children believe that anything is possible and gives them the strength to fight harder against their illnesses. This impact is why Make-A-Wish employees, board, and volunteers are driven to make every one of these wishes come true. Many of our employees support Make-A-Wish Oregon and we also employ a “wish granter” who volunteers to provide initial wish visits for children, ongoing updates for families, as well as wish-granting parties and send-offs. In 2023, the annual Wish Ball raised over \$850,000 to help grant wishes for kids with critical illnesses in Oregon and southwestern Washington.

Clockwise, from top left: A wish to meet Microsoft VR programmers is granted; volunteers participate in a room makeover; a young man learns that his wish to visit Universal Studios will come true.



SUPPORTING OUR EMPLOYEES

ATRIO Matching Gifts Program

The **ATRIO** Matching Gifts Program was created to support the generosity and encourage further involvement of employees within the communities we serve. ATRIO provides matching funds for any non-profit organization by matching dollar-for-dollar donations made by eligible employees. In 2023, 10 employees donated \$14,163.91 to charitable causes in their community.

*When matched, **ATRIO** and its employees together contributed \$22,342 to support local organizations.*

ATRIO PTO to Volunteer in the Community

ATRIO provides up to 16 hours of Paid Time Off (PTO) to serve in our communities. In 2023, 19 employees donated 16 days/128 hours (volunteer PTO hours) to charitable causes in their community which exceeded our goal of 100 hours. In addition, 3 employees donated 66 hours of their own time to causes in their communities.

Employee Involvement

While committed to earning our members' loyalty through dedication, quality, and service excellence, we understand the importance of re-investing our resources back into the communities we serve. **ATRIO** Health Plans' employees will continue to support projects in 2024 through the Matching Gifts or Volunteer PTO programs in an effort to help sustain the growth, health, and viability of these community-based activities.

OUR VOLUNTEERS



Employee and ATRIO Contributions

3000 Club – Market on the Move

Rescues produce, dry, canned or packaged goods to share with people in need of nutritional produce.

Bring Smiles to Seniors

Works with individuals to decorate cards for seniors in nursing homes, assisted & independent living communities, homebound or participating in elderly nutrition programs.

Coronado Neighborhood Association

Supports a vibrant and diverse community to make Coronado an attractive and desirable place to live through building a united and informed neighborhood, increasing neighborhood safety, promoting artistic and cultural appreciation, and hosting events to bring neighbors together.

Discovery School Parent Teacher Organization

A dedicated group of parents, teachers, and administrators, working to provide resources and programs to all families and to strengthen the school community.

Douglas Education Service District

Assists school districts and the Department of Education in achieving Oregon's educational goals by providing equitable, cost-effective and locally responsive educational services at a regional level. Partner Sports Camp pairs campers with disabilities to those without disabilities, giving each an opportunity to gain experience working with the other to understand the daily challenge each faces.

Elevate MeD

Committed to elevating the field of medicine by providing financial support and mentorship to future physicians and to increase physician workforce diversity and improve cultural competence among physicians.

Family Building Blocks

Focuses on prevention and partners with families with the greatest needs to provide high-quality, critical, and voluntary services.

Glacier View Bible Church

Provides a summer program for local children, featuring arts & crafts, game time, teaching time and nourishment for kids.

Hawai'i Community Foundation – Maui Strong Fund

Provides financial resources that can be deployed quickly, with a focus on rapid response and recovery for the devastating wildfires on Maui.

International Fellowship of Christians & Jews

Builds bridges between Christians and Jews, blessing Israel and the Jewish people worldwide with humanitarian care and aid.

The Joy Bus Diner

Works to improve the lives of patrons through good food and company and to relieve the daily struggles of people with cancer by delivering a fresh and healthy meal with a friendly face.

Laura Baker Services Association

Strives to respect the life choices and dreams of people with developmental disabilities and help them reach their goals.

Employee and ATRIO Contributions

Make a Wish of Oregon

Creates life-changing wishes for children with critical illnesses.

Michael J. Fox Foundation for Parkinson's Research

Dedicated to finding a cure for Parkinson's disease through an aggressively funded research agenda and to ensuring the development of improved therapies for those living with Parkinson's today.

National Medical Association

Promotes the collective voice and interests of physicians and patients of African descent and a leading force for parity in medicine, elimination of health disparities and promotion of optimal health.

Northwestern University – Feinberg Promise Scholarship

Established to help enroll and support underrepresented students in the Feinberg School of Medicine.

Shriner's Hospitals for Children

Provides compassionate care and pioneering medical treatment to all children, regardless of a family's ability to pay for insurance status.

Smile Train, Inc.

Supports safe and quality cleft care for children throughout the world.

SOLVE

Restores and preserves Oregon's environment by mobilizing the power of volunteers and partners with the generosity of donors.

St. Jude Children's Research Hospital

Advances cures and means of prevention for pediatric catastrophic diseases through research and treatment.

St. Mary's Food Bank Alliance

Serves to alleviate hunger through the gathering and distribution of food while encouraging self-sufficiency, collaboration, advocacy and education.

Tillamook County 4-H

Empowers young people with hands-on learning experiences to help them grow and thrive and develop the skills needed to make a positive impact on the world around them.

Tiger Mountain Foundation

Works with communities to better themselves through neighborhood revitalization and beautification and garden volunteer work.

Transponder

A transgender-founded and led nonprofit based in Eugene, Oregon, providing support, resources, and education for the transgender and gender-diverse community and our allies.

Tunnel to Towers Foundation

Honors the sacrifice of firefighter Stephen Siller, who laid down his life to save others on September 11, 2001. Also honors our military and first responders who make the supreme sacrifice of life and limb for our country.

Wildlife Safari

Provides the highest quality interaction with wildlife to inspire lifelong commitments to conservation, education and the preservation of native and exotic species.

2024 BENEFIT COMPANY GOALS

ATRIO staff have been working on policies and procedures to facilitate our benefit company and mission promise. Our 2024 budget includes continuing investments in the communities we serve, including:

Charitable contribution matching for staff to local non-profits in our communities

ATRIO will contribute matching funds, ranging up to \$1,500 per calendar year, and up to 3 charitable organizations for employees who contribute to charities in the communities we serve.

Paid time off to Volunteer at Local Charity Events

ATRIO instituted a policy allowing staff an additional 2 days of paid time off (PTO) when the day is used to support local charities in the communities we serve.

ATRIO's goal for 2024 is to contribute 200 volunteer hours in the community, which is an increase of 56% from 2023.

Local contributions to projects and programs impacting Medicare-eligible members

Special consideration of worthy charitable investments will be given to those projects impacting the Medicare-aged population and our Special Needs member population.

ATRIO is committed to serving these segments of the market as a Medicare Advantage Health Plan in 2024.

Local. Dependable.
That's **ATRIO.**



CONTACT INFORMATION

***ATRIO Health Plans** has offices in Salem (Corporate headquarters), Roseburg, Medford, Tigard, and Klamath Falls in Oregon. We also have an office in Reno, Nevada, and a call center in Phoenix, Arizona.*

Member Services Call Center

1-877-672-8620 (TTY 711) Hours are from 8 a.m. to 8 p.m. local time, seven days a week from October 1 — March 31. From April 1 — September 30, hours are from 8 a.m. to 5 p.m. local time, Monday – Friday.

Walk-in office hours

Monday – Friday, 8 a.m. - 5 p.m.

OREGON

Douglas County

2270 NW Aviation Drive, Suite 3
Roseburg, OR 97470

Klamath County

404 Main Street, Suite 5
Klamath Falls, OR 97603

Jackson & Josephine Counties

810 O'Hare Parkway, Suite B
Medford, OR 97504

Tigard

13190 SW 68th Parkway, Suite 100
Tigard, OR 97223

Marion & Polk Counties

2965 Ryan Drive SE
Salem, OR 97301

NEVADA

520 W 6th Street
Reno, NV 89503



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1-877-672-8620 (TTY 711)