



## Medicare Appointment & Enrollment Checklist

Please have these on hand before **and** during our meeting so we can best assist you promptly

### 1. Personal Information

- Full Legal Name (as displayed on SS Card)
- Social Security Card
- Date Of Birth
- Home Address and Contact Number
- Email Address
- Emergency Contact(s)

### 2. Medicare & Insurance Details

- Medicare Card
  - Showing Part A & B Start Dates
  - Medicare Number
  - Employer Coverage information
    - **If retiring or**
    - **Losing coverage**
  - Other current health insurance (COBRA, PERS, TRICARE, VA, etc)

### 3. Prescriptions

Prepare a list of all current medications, dosage and frequency.  
Include preferred pharmacy(s) and note mail-in order if applicable!

### 4. Doctors & Clinics

- Primary Care Provider (PCP) now required
- Specialists
- Preferred Hospitals or Medical groups
- Clinics you want to keep (for network verification)

## 5. Payments & Billing

- Preferred Payment Method
  - Social Security Direct (if available)
  - Check
  - Bank Draft (ACH/EFT)
  - Debit or Credit Card
- Account Information (if automatic premium draft)

## 6. Enrollment Timing

- Turning 65 (Initial Enrollment)
- Retiring / Losing qualified coverage
- Reviewing Coverage during Annual Election Period
  - **October 15th - December 7th**
- Changing Advantage plan during MA Open Enrollment
  - **January 1st - March 31st**
- Any valid Special Election Period (SEP)

## 7. Optional Extras

- Dental, vision, or hearing plan information
  - In cases where these not offered by a plan you want, these can be standalone plans, but have to be outside of a Medicare consultation/meeting per Center of Medicare & Medicaid Services (**CMS**) guidelines
- Recent medical bills or statements
  - For frequent services, can help us establish an accurate estimate of expected costs you may incur
- Travel Habits (Domestic & International)
  - Important for plan networks
- Personal notes, questions or goals:
  - Keep Current doctors or PCP
  - Lower Costs
  - Add services
  - etc.

**DISCLAIMER:** We do not offer every plan available in your area. Any information provided is limited to the plans we do offer. For a full list of your options, visit [Medicare.gov](https://www.Medicare.gov) or call [1-800-MEDICARE](https://www.1-800-MEDICARE.org) (800-633-4227)