



Checklist for Online Medicare, Retirement, & Spouses Applications

The information below will help you gather the information you may need to create a **my Social Security** account and complete the online Medicare, Retirement, and Spouse's applications. We recommend you print this page to use while gathering your information.

Create a **my Social Security Account**

You are required to login to your existing **my Social Security** account, or attempt to create one. To create an account, we will ask you a series of identity questions for verification. You may want to have certain items on hand to be prepared for additional security questions, such as, but not limited to: **mobile phone (for the purpose of receiving texts and emails), credit card, W-2, and tax forms.**

File for Benefits Online – The Information You Need	Medicare Only	Retirement & Spouses
Date and Place of Birth If you were born outside the United States or its territories: <ul style="list-style-type: none"> Name of your birth country at the time of your birth (it may have a different name now) Permanent Resident Card number (if you are not a U.S citizen) 	X	X
MEDICAID Number (State Health Insurance) - Start and End Dates	X	
Current Health Insurance <ul style="list-style-type: none"> Employment start and end dates for the current employer (of you or your spouse) who provides your health insurance coverage through a Group Health Plan Start and end dates for the Group Health Insurance provided by you (or your spouse's) current employer 	X	
Marriage and Divorce <ul style="list-style-type: none"> Name of current spouse Name of prior spouse (if the marriage lasted more than 10 years or ended in death) Spouse(s) date of birth and SSN (optional) Beginning and ending dates of marriage(s) Place of marriage(s) (city, state or country, if married outside the U.S.) 		X
Names and Dates of Birth of Children Who: <ul style="list-style-type: none"> Became disabled prior to age 22, or Are under age 18 and are unmarried, or Are aged 18 to 19 and still attending secondary school full time 		X
U.S. Military Service <ul style="list-style-type: none"> Type of duty and branch Service period dates 		X
Employer Details for Current Year and Prior 2 Years (not self-employment) <ul style="list-style-type: none"> View your Social Security Statement online at www.socialsecurity.gov/myaccount Employer name Employment start and end dates 		X
Self-Employment Details for Current Year and Prior 2 Years <ul style="list-style-type: none"> View your Social Security Statement online at www.socialsecurity.gov/myaccount Business type Total net income 		X
Direct Deposit - Domestic bank (USA) <ul style="list-style-type: none"> Account type and number Bank routing number 	Direct Deposit - International bank (non-USA) <ul style="list-style-type: none"> International Direct Deposit (IDD) bank country Bank name, bank code, and currency Account type and number, branch/transit number 	
		X