



Let's face it: Medicare plans can be confusing, especially for first-time enrollees.

- 🕒 But even if you already have one and simply need to make changes, preparing for the enrollment period may feel like a whirlwind of essential dates, coverage types, and paperwork. The good news is that gathering some key information prior to meeting with an insurance professional can make choosing a plan much smoother.

Use this checklist to collect what you'll need before you start comparing plans. And should you want some assistance, reach out for personalized guidance!



1 PERSONAL INFORMATION

Plans will differ from area to area, so you'll need to supply general info about yourself to get an accurate assessment of what's available to you. This info will also be required for enrollment. Have handy your:

Birth date	Phone number	Social Security number
<hr/>	<hr/>	<hr/>
Email address	Permanent address	Emergency contact information
<hr/>	<hr/>	<hr/>

2 LONG-TERM CARE FACILITY INFORMATION

Your Medicare coverage may be different if you live in a long-term care facility versus a private home. To research and enroll in the plan that's right for you, it's helpful to have the following:

If you are a current resident of a long-term care facility, be prepared with the full name of the institution, its address, and the main phone number.

NAME OF FACILITY	<hr/>
ADDRESS	<hr/>
PHONE NUMBER	<hr/>

If you intend to move into or out of a long-term care facility, be ready to provide the date of your move.

3 MEDICARE MEMBERSHIP AND POLICY INFORMATION

If you're already receiving Social Security benefits, you should get your Medicare card in the mail from the Social Security Administration (SSA) three months before you turn 65. (If you haven't received your Medicare card, give the SSA a call at 1-800-772-1213. TTY users can call 1-800-325-0778.) Have your card available so you can provide your:

Medicare claim number (also called a Medicare Beneficiary Identifier or MBI)

Medicare effective date

If you have other insurance coverage, you'll also need:

The carrier's full name	Policy number
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Member ID number

Group number



4 CONTACT INFO FOR CURRENT HEALTH-CARE PROFESSIONALS

It's important to know whether the Medicare plan you're considering covers the doctors and other providers you currently have or want to see. You'll save yourself some time if you gather the following information:

Name and address of your preferred hospital

NAME OF FACILITY _____

ADDRESS _____

Names and addresses for all doctors and specialists you receive care from

5 PRESCRIPTION DRUG INFORMATION

Part D and Medicare Advantage plans are not the same when it comes to prescription drug coverage. They differ in the list of drugs they cover (called a formulary), costs, and pharmacy networks. Having the following information ready can help you choose the plan that suits your coverage needs and budget:

The name, address, and phone number of your pharmacy

NAME _____

ADDRESS _____

PHONE NUMBER _____

All your current prescription drugs and dosages

[illegible]



6 PERSONAL HEALTH INFORMATION

If you're switching coverage, you'll want to take stock of your current health to help define the type of plan that may serve you best. For example, if you have diabetes, you might opt for a Special Needs Plan specifically tailored to people with that condition. Make note of:

Your current health conditions

Any ongoing treatments you're receiving (e.g., chemotherapy, dialysis) that you'll need covered

7 PAYMENT INFORMATION

When you enroll, you'll be asked how you'd like to pay your plan's premium. Some common options are payment coupons, electronic funds transfers (EFT) from a bank account, and automatic withdrawals from your monthly Social Security checks. (Note that the premium for Plans A and B are automatically deducted, but you may also be able to have deductions taken for other plans.) If you choose EFTs, be sure to have:

The account holder's name

Bank routing number

Bank account number

Account type

CHECKING

SAVINGS

Even with the help of this checklist, enrolling in or changing your Medicare coverage can be overwhelming. Reach out today, and let's help you get the right plan to fit your eligibility, needs, and budget.