

MEDICARE CHECKLIST



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LEARN ABOUT THE MEDICARE PARTS

(Part A and B = Original Medicare)

Please remember that there are specific guidelines for Medicare coverage qualification.

- ☐ **Part A:** Covers inpatient Hospital Care, Skilled Nursing Facilities, Hospice, and Home Health Care. Most people don't pay a premium for Part A if they've worked for at least 10 years.
- ☐ **Part B:** This covers most medical procedures and comes with a monthly premium that varies based on your income.
- ☐ **Part C:** Medicare Advantage (Private Insurance) - Medicare Part C bundles Original Medicare (Parts A and B) coverage with extra benefits.
- ☐ **Part D:** Prescription Drug Coverage (Private Insurance) - Medicare Prescription Drug Plan, offers help with prescription costs. You can get Part D coverage either as a standalone plan added to Original Medicare or as part of a Medicare Advantage plan.



DETERMINE YOUR MEDICARE ELIGIBILITY

- ☐ Turning Age 65 (Initial Enrollment Period - 7 months)
- ☐ Disability (24 month of receiving Social Security Disability Insurance - SSDI)
- ☐ End-Stage Renal Disease (ESRD) or Amyotrophic Lateral Sclerosis (ALS) may allow you to enroll earlier.



COLLECT NECESSARY INFORMATION

- ☐ Social Security Number
- ☐ Birthday
- ☐ Address
- ☐ Health Insurance Information (Keep pre-Medicare insurance details handy)



EVALUATE YOUR HEALTHCARE NEEDS

- ☐ Current Health Status
- ☐ Prescription Medications
- ☐ Dental, Vision, Hearing
- ☐ Future Medicare Procedures

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CHOOSE YOUR OPTIMAL ENROLLMENT OPTION

- ☐ **Initial Enrollment Period:** Three months prior to your 65th birthday month, your birthday month and three months following your birthday month seven months total.
- ☐ **General Enrollment Period:** Miss your initial enrollment period? General enrollment period is January 1st to March 31st each year (Penalties May Apply).
- ☐ **Special Enrollment Period:** SEPs are triggered by specific life events or situations (ie. Loss of employer coverage, moving, etc.)



ENROLL IN MEDICARE PARTS A AND B (ORIGINAL MEDICARE)

You may enroll in Medicare Parts A and B online, by phone, or at your local Social Security office once you're eligible. You can enroll online through the Social Security website or visit your local Social Security office if you prefer the face-to face experience



EXPLORE MEDICARE INSURANCE COVERAGE

- ☐ **Medicare Advantage (Part C):** These plans cover all Parts A and B benefits, and usually offer extra benefits like vision and dental.
- ☐ **Medicare Prescription Drug Plans (Part D):** You can use Part D to reduce your prescription costs. Medicare Advantage plans generally offer Part D coverage.
- ☐ **Medicare Supplement Plans (Medigap):** Pays some of Original Medicare's out-of-pocket expenses.



DECIDE WHICH MEDICARE INSURANCE PLAN IS BEST FOR YOU ***IMPORTANT***

Note: Selecting a Medicare Insurance Plan requires careful consideration of many factors. While the list below highlights key considerations, please remember that selecting a Medicare plan requires careful thought about numerous aspects.

- ☐ **Cost:** Examine the premiums, deductibles, and your out-of-pocket expenses.
- ☐ **Coverage:** Check if your plan includes your preferred doctors and medications.
- ☐ **Flexibility:** Verify the plan's network coverage and service accessibility.

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ENROLL IN THE MEDICARE INSURANCE PLAN THAT SUITS YOUR SPECIFIC NEEDS

Successfully enrolling in a Medicare Insurance plan requires careful timing, preparation, and a methodical approach. Submitting an accurate enrollment application is crucial.



LEARN HOW TO USE THE "ADDITIONAL BENEFITS" AVAILABLE TO YOU.

Don't overlook any additional benefits that might come with your plan! Some Medicare plans may cover things like gym memberships, wellness programs, or even home-health visits. Make sure to research these benefits and learn how to utilize them for your health and wellbeing. Additional benefits such as dental, hearing, and vision coverage may be available to you. Certain Medicare insurance plans also offer chiropractic visits, foot care and money towards over-the-counter products.



REVIEW YOUR PLAN ANNUALLY TO ENSURE IT CONTINUES TO SERVE YOUR NEEDS

Annual reviews help your plan keep pace with your changing healthcare needs. Open enrollment is the time to update your plan if your health or medications have changed.



FIND PLEASURE IN KNOWING YOU DID EVERYTHING NECESSARY TO OBTAIN THE BEST PLAN POSSIBLE

Congratulations! Completing our Medicare checklist puts you on the right path to obtaining the benefits you deserve. The peace of mind and sense of accomplishment that comes from knowing you've done what's needed is invaluable. Remember, this is your health—it's worth the effort to get the best plan possible.

As a professional Medicare guide I will help you with every item on this checklist. Many of the above listed items require careful consideration and planning. I pride myself in learning about your specific healthcare needs and matching the best Medicare plan for your needs.

Here is my checklist as your expert Medicare guide:

As your Medicare expert, here's my checklist:

- ☐ **Healthcare Needs:** Begin by identifying your particular healthcare needs and desires.
- ☐ **Initial Steps:** I'll provide you with the initial steps we take to begin the Medicare Journey
- ☐ **Questions:** I will answer your questions about Medicare and your healthcare needs, both now and in the future.

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- ☐ **Simplify Medicare:** As your Medicare guide, I will provide you an easy-to understand explanation of your Medicare medical and prescription drug coverage.
- ☐ **Planning:** We'll collaborate on your Medicare enrollment plan.
- ☐ **Medicare Insurance Options:** I will present the available Medicare insurance options in your region, tailored to your specified criteria.
- ☐ **Questions:** I will address any additional questions that arise after we complete the aforementioned steps.
- ☐ **Enrollment:** Collaborate during enrollment to ensure accuracy and timely completion.
- ☐ **Questions:** Post-enrollment, please don't hesitate to ask any further questions you may have.
- ☐ **Plan:** Make plans for yearly performance reviews and other important life events.
- ☐ **Availability:** Once your new Medicare coverage begins, I'm available to assist with service problems or answer coverage questions.
- ☐ **Annual Review Meetings:** September of each year is when you may schedule your annual review meetings. These one-on-one meetings will address any current or new health concerns. We can explore other Medicare plans that might be a better fit for you during these meetings.
- ☐ **Monitor:** I will continue monitoring Medicare changes and staying updated on new and existing plans. If this information pertains to your health insurance needs, and I'll pass it along.

[Schedule Meeting](#)