

MEDICARE

Enrollment ✓ Checklist



MEDICARE ENROLLMENT CHECKLIST

Check off the following steps as you travel through your “New to Medicare” journey.

Get stuck along the way? Head over to AllySeniorBenefits.com/contact/ and we’ll get you “un-stuck.”

Find out if you’re eligible for Medicare and how much your Part B premium will be. Check your eligibility here:

www.medicare.gov/eligibilitypremiumcalc/

Sign up 3 months before you turn 65 (even if you’re working). Sign up early so your Medicare begins on the 1st day of your birthday month. Sign up at SocialSecurity.gov/medicare if you are not already receiving Social Security when you turn 65.

Are you receiving Social Security? If “YES,” you will be enrolled in Medicare automatically three months before you turn 65 (effective the first day of your birthday month).

Already have Medicare Part A? Download the form and follow the instructions to enroll in Medicare Part B.

www.cms.gov/Medicare/CMS-Forms/CMS-Forms/CMS-Forms-Items/CMS017339.html

Learn about the differences between Medicare Supplements (Medigap) and Medicare Advantage.

Choose a plan type: Medigap or Medicare Advantage.

Enroll in a plan as soon as you get your Medicare card. Enroll through an agent you trust, enroll online, or call a carrier direct. Agent services are always free.

Choose and enroll in a Part D (drug) Plan using the Medicare.gov plan finder, by calling 1-800-MEDICARE, or getting help from an agent. (If you decided on a Medicare Advantage Plan, your plan should include this. Double check before completing the enrollment).

Breathe a big sigh of relief and wait for your plans to start on the first day of your birthday month.

Congratulations!
We hope this checklist was helpful.