

MEDICARE CHECKLIST



RETIRING OPTIONS SIMPLIFIED

(408) 502-7080

WWW.RETIRINGOPTIONS.COM



6 MONTHS PRIOR TO 65TH BIRTH MONTH

- IF YOU ARE STILL EMPLOYED, DECIDE IF YOU SHOULD ENROLL IN MEDICARE PARTS A AND/OR B.
- LEARN MEDICARE BASICS. UNDERSTAND THE DIFFERENCES BETWEEN MEDICARE ADVANTAGE & MEDICARE SUPPLEMENT (MEDIGAP) PLANS. (START DECISION MAKING)
- IF BUYING A MEDIGAP, THEN COMPARE PART D (DRUG) PLANS.
- MAKE A LIST OF ALL PLANS & PREMIUMS TO BE EXPECTED.

1 MONTH PRIOR TO 65TH BIRTH MONTH

- CONFIRM YOU HAVE YOUR MEDICARE CARD (RED, WHITE AND BLUE) FROM CMS.
- MAKE SURE MEDIGAP/PART D/ ADVANTAGE PLAN CARDS.
- CANCEL PREVIOUS HEALTH PLAN.

4 & 3 MONTHS PRIOR TO 65TH BIRTH MONTH

- 4 MONTHS PRIOR ENROLL IN PARTS A & B ONLINE.
3 MONTHS PRIOR IF DOING AN IN-OFFICE ENROLLMENT. IF DELAYING PART B, ENROLL IN PART A ONLY.
- CHECK YOUR STATUS & LOOK FOR YOUR MEDICARE CLAIM NUMBER. GO TO SSA.GOV, MEDICARE.GOV, OR CALL (800) MED-ICARE (800-633-4227) MEDICARE IS OPEN 24/7.
- CALL US TO ENROLL INTO THE PLAN:
-SUPPLEMENT (MEDIGAP) & PART D
-MEDICARE ADVANTAGE (PART C)
MUST HAVE A MEDICARE CLAIM # OR MEDICARE CARD

YEARLY CHECK-UP OCT. 15TH – DEC. 7TH BIRTHDAY RULE

- SEPT/OCT START CHECKING YOUR ANOC (ANNUAL NOTICE OF CHANGES) IN YOUR MAIL OR EMAIL.
MEDICARE ADVANTAGE (PART C) & DRUG (PART D) PLANS ONLY
- ***NO ANOC FOR MEDIGAPS***
(SOME STATES HAVE A BIRTHDAY RULE TO CHANGE MEDIGAP PLANS)