

What You Need to Do before Calling an Agent

Calling a licensed agent is the easiest way to get connected to the Medicare coverage that makes sense for you. For example, if you're thinking about choosing a Medicare Advantage or Medigap plan, an agent can help you decide what's the best fit.

Before you call an agent, however, it's helpful to have your ducks in a row. You'll need basic information (like your name, date of birth, address, Social Security number, etc.), but there's more you can do to make your call go as smoothly as possible.

Luckily, if you've been following along and filling out this packet, you should have nearly everything you need.

Step 1: Gather these items:

- Your red white and blue Medicare card.
- The list of medications you take (from the Medicare Prescription Drug Worksheet).
- The list of doctors and plans that you filled out on the Medicare Providers Worksheet.

Step 2: Answer these questions:

What hospitals and diagnostic centers do you go to?

- | | |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

What pharmacies do you go to?

- | | |
|----------|----------|
| 1. _____ | 3. _____ |
| 2. _____ | 4. _____ |

Are you getting any subsidies like Medicaid, Extra Help, etc.? (Check any that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Medicaid | <input type="checkbox"/> Other (fill in the blank)
_____ |
| <input type="checkbox"/> Supplemental Security Income | |
| <input type="checkbox"/> Medicare Savings Program | <input type="checkbox"/> I don't get any subsidies from any
of these programs |
| <input type="checkbox"/> Extra Help | |

Step 3: Have your bank account information handy (routing/account numbers)

If your agent determines a Medigap plan might be your best option, you will need to provide your bank account information. This is because an insurance company won't accept a Social Security payment as premiums; it requires a direct deposit from a bank.

Always keep your bank account information in a safe place. Don't write your bank account information on this paper unless you plan to keep it in a secure location.

Step 4: Call 833-271-0865 to speak with a licensed agent.

Once you have all of the above information in one place, you're ready to call an agent.

Agents are available Monday-Friday from 8:30am-5:00pm MST.

Disclaimer:

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