



My enrollment checklist

Here is a complete list of the information you'll need in order to enroll in a Medicare plan.

Documents

Medicare card
for current state

Banking information

Checking account number:

Routing number:

Previous year's insurance

If you're replacing coverage, we'll have a few questions about your previous plan.

Personal information

Date of birth

Social Security number

Email address

Primary address
including county

Mailing address
if different

Phone numbers

City: _____ State: _____

City: _____ State: _____

Zip: _____ County: _____

Zip: _____ County: _____

Healthcare information

Healthcare providers (primary, specialists, hospitals)

Name:

Specialty:

Address:

Phone:

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Current prescription medications (name, dosage and frequency)

Medication name:

Dosage:

Refill quantity:

Refill frequency:

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If you are purchasing plans for your dependents, you will need the same information for each dependent.