



New to Medicare Checklist

iHealthBrokers offers free, unbiased Medicare education nationwide. As your advocate, we work for you, not the insurance company! Your journey to Medicare should begin at least six months before your 65th birthday. If you or someone you know needs help with any of the steps below, please call us at (888) 679-1413 .

4-6 Months Before

- Confirm your eligibility for Medicare benefits by contacting the Social Security Administration or the Railroad Retirement Board.
- If you or your spouse are still employed, contact Human Resources to see what happens after you become eligible for Medicare.
- Compile a list of current medications, dosages and frequencies along with any medical providers. you wish to continue to see.

3 Months Before

- Enroll in Medicare Part A & B online or by phone through Social Security via SSA.gov or by calling (800) 772-1213.
- If you or your spouse have employer benefits that you wish to keep, you may consider delaying enrollment to Part B.
- Start learning about the different types of Medicare at [youtube.com/iHealthBrokers](https://www.youtube.com/iHealthBrokers) or by giving us a call.

1-2 Months Before

- Enroll in a Part D plan and Medicare Supplement (Medigap) Plan or a Medicare Advantage Plan.
- Confirm receipt of your Red, White and blue Medicare card, along with your ID cards from your enrollments above.
- Cancel old coverage, if needed.

Annually

- Confirm receipt of your Annual Notice of Change documents which are mailed to you in late September.
- Review your coverage during the Annual Enrollment Period from 10/15 through 12/07.
- Remember that the services of an agent or broker are free. A good agent will help you with every step above and be available year-round for claims assistance and billing questions.

 [\(888\) 679-1413](tel:(888)679-1413)

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 [iHealthBrokers.com](https://www.iHealthBrokers.com)

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