



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 the county

Mailing Address
(if different)

Phone Numbers

Health Care Information

Health Care 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.