

Your Checklist to Obtain MediCare Supplement Coverage

We are pleased you have selected us to assist you in meeting your MediCare Supplement needs. We will do our best to make the process efficient and painless for you. Please do a little preparation and obtain the information indicated for your situation below and bring it to our appointment. This helps us help you.

If you have collected the information, enter it on the 'Pre-Enrollment Form e-mailed or sent in the mail. It is easy to complete - and will save significant time at our appointment. You may not need to complete every line if the requested information on the form does not apply to you.

If you have not applied for MediCare, you can apply online at <https://www.medicare.gov>.

MediCare Supplements

- Completed 'MediCare Pre-Enrollment' form.
- A copy of your MediCare card.
- Complete list of medications, dosages & frequency taken.
- MediCare supplement ID cards if you are currently enrolled in any plans.

Your Checklist to Confirm Your Coverage

- If you are new to MediCare, you must notify your current carrier (or CoveredCa if you have been receiving a subsidy) that you are receiving for MediCare and your effective date.
- Confirm your old insurance is cancelled with the carrier.
- Cancel any auto payments on your discontinued policies.
- Have you received your ID card for your new plans by the effective date? Confirm it is for the plan you wanted.
 - ➔ Let us know if you have not.
- Pay your 1st month premium to activate your policy. You may receive a bill for the 1st month's premium. Pay it to activate your policy even though you may have signed up for auto-payment.
- Read all notices from your insurance carriers. These may be notices that require you to take additional action to obtain coverage.
 - ➔ Call us so we can assist you.
- Start a file of all notices from Social Security, MediCare & your insurance carriers.
 - ➔ Have these notices in hand when you call us for assistance.
- Verify your old plan and auto-payments are cancelled (Customer service # on ID card) when you change insurance carriers.
 - ➔ We are not allowed to do this for you.
- Consider enrolling in prescription delivery by mail. (It can be cheaper and very convenient.)

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