

# New to Medicare Checklist

Stroman Insurance Advisors offers free, unbiased Medicare guidance across the U.S. As independent brokers, we work for you, not the insurance company. If you need help with anything in this checklist, please reach out to us by calling (404) 595-4740 or scheduling an appointment at [stromaninsurance.com/appointment](https://stromaninsurance.com/appointment).

## 6 months before turning 65

- Start learning about Medicare, when to enroll, and your plan options.
- To confirm your Medicare eligibility, you can contact the Social Security Administration.
- Gather a list of your medications and the doctors you want to continue seeing.

## 3 months before turning 65

- Enroll in Medicare Part A and Part B: SSA.gov or call (800) 772-1213.
- If you want to stay on your group plan until retirement, enroll in Part A only.
- Enroll in a Medigap (Medicare Supplement) plan and Part D plan OR a Medicare Advantage plan.

## 1-2 months before turning 65

- Confirm receipt of your Medicare ID card (red/white/blue).
- Confirm receipt of ID card(s) for the plan(s) you chose.
- If you are leaving a group plan, confirm that it will end at the right time. Medicare only starts on the 1st of a given month. Ideal last day of group coverage is the last day of the month before Medicare starts.

## If you deferred Part B until retirement

- Confirm your last day of group health coverage.
- Enroll in Part B. Start date should be the 1st of the month after group coverage ends.
- Enroll in a Medigap (Medicare Supplement) plan and Part D plan OR a Medicare Advantage plan. Start date should be the same as Part B.

## Annual Enrollment Period (10/15 through 12/7 every year)

- Review your plan's annual notice of changes (ANOC). Medicare Advantage and Part D plans will send them around September.
- No action is needed for Medigap (Medicare Supplement) plans.
- Check new plan options and determine if you need to make a change. If you'd like our help, contact us and we'll guide you through the process.