



ITEMS TO BRING WITH YOU OR TO HAVE KNOWLEDGE ABOUT FOR THE MEDICARE CONSULTATION APPOINTMENT

You are not required to bring any documents or any of this information with you to the appointment; however, having the following information with you OR accessible to you may help streamline the appointment and information gathering time.

We look forward to meeting with you. ☺

1.	Demographic information (name, date of birth, marital status, living arrangement (facility name, address, county), phone numbers
2.	If someone helps you with your healthcare decisions please arrange for them to attend the appointment. Also bring any HIPAA release forms, Power of Attorneys, Guardianship or Conservatorship documents as applicable.
2.	Information about your current health insurance coverage (bring cards if you have them): --Medicare effective dates --Health insurance company name(s) and type(s) of coverage --Eligibility for AHCCCS, Veterans benefits, Tri-care, Indian health services --Current premium amounts paid for all insurance, etc.
3.	Information about your current health providers: --primary care physician name, address, phone number --other doctors' or specialists' names, addresses, and phone numbers --hospital preference --pharmacy preference --durable medical equipment providers
4.	Information about your prescriptions: --name of drug (actual one you take) --dosage and how many (pills, chews, etc.) in each refill --how often refilled OR --printout from your pharmacy indicating the information listed above
5.	Legal Documents: --Durable Healthcare Power of Attorney
To determine potential eligibility for Low-Income Subsidy (LIS) or the Medicare Cost-Sharing programs (MCS), you may want to have information pertaining to ...	
6.	Assets (type of asset, value of assets, debt on assets) (example: financial accounts, investments, retirement accounts, annuities, life insurance, burial insurance, burial plans, businesses, property, vehicles, etc.)
7.	Income (type of income, amount received, how often received) (example: Social Security, government pensions, retirement pensions, annuities, rental income, earned income, etc.)
8.	Military service (dates of service, whether or not service was during wartime, honorable discharge)
9.	Type of work person needing care did for a living (to see if other benefits might be available to you