Help Us Help You Below is Your Documents Checklist

Please bring as much information as you can to your APPRISE Counseling Appointment or enrollment event. In doing so, we will find the best possible options for your personal situation.

Please Bring With You:

⇒ Your Medicare Red, White, and Blue Card or Medicare Advantage Plan HMO/PPO Card

⇒ Your Pennsylvania Community Health Choices and/or Medicaid Health Choices/ Managed Care (HMO) Identification Cards

⇒ Any other Insurance or Prescription Drug Plan Cards and/or Plan Benefit Booklets


⇒ Your Asset or Resource Information – CD, Checking, Savings, Stocks, Bonds, IRA, 401B or K

⇒ Medication Drug List – Please Include: Medication Dosage, Number of Pills/Month, Milligrams, Pharmacy Name, Address Information, and Mail Order Information

⇒ Any Letters About Your Insurance Coverage From:

✓ The Social Security Administration concerning your eligibility for the Extra Help Program, or Medicare or Prescription Drug Plan concerning changes in your prescription drug coverage.

✓ Your Prescription Insurance Company concerning creditability of your present Medicare Part D Prescription Plan coverage.

✓ Please bring any others letters or cards about your Medicare or Part D Coverage, including letters or cards from your Employer/Union, Retiree Insurance Plans, or PACE/PACENET Programs.

✓ The Pennsylvania Department of Public Welfare (DPW) or Maximus about changes to your Medicaid or Community Health Choices Coverage.

✓ Your Local State County Assistance Office concerning the Buy In or Medicare Savings Programs payments by DPW towards your Medicare Health Plan Premiums, or payments for your “Part B” Medical Copays or/and Deductibles.

⇒ In addition, you may bring a list of any questions you would like to ask the APPRISE Program Counselor.

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