

Checklist for Medicare Enrollment

If you are currently receiving Social Security Retirement benefits, you will automatically be enrolled in Medicare and you will receive your Medicare card 3 months prior to your 65th birth month or the 25th month of your Social Security benefits.

If you are not currently receiving Social Security Retirement Benefits, to make Medicare effective on the 1st of your 65th birth month, you must apply up to 3 months prior to or no later than one month prior to your 65th birth month (or if you are born on the 1st of the month Medicare will go into effect the month prior to your 65th birth month).

*If you are continuing to work and have coverage by you or your spouse's employer's medical benefits, you can apply for your Medicare card but electing only Part A at this time. **(There is no premium for Part A benefits.)***

However, if you are participating in a Health Savings Plan (HSA) you do NOT want to enroll in any part of Medicare. By enrolling in Medicare Part A, you nor your employer may contribute to the HSA.

Lastly, if the employer has less than 20 employees, you may be required to enroll in both Medicare Part A and Medicare Part B. Check with the Benefits Representative for your employer insurance.

You have 2 options to enroll:

- 1) Online at SocialSecurity.gov, select "Sign-up for Medicare" under the heading of "Apply". To apply online, you will need to set up an online Social Security account, if you have not already created one. Be sure and write down your user id and password.
- 2) Call your local Social Security office and make an appointment. (**Fort Wayne 1-877-223-6061** or **Auburn 1-866-829-2170**). Currently the offices are only conducting telephone interviews.

Completed: Date _____ **Method: Online or Phone**

If you continue working past age 65 and 3 months, you will need 2 Medicare application forms: "Application for Enrollment in Medicare Part B (Medical Insurance)" form CMS-40B, and "Request for Employment Information" form CMS L564/R297. You complete the first form (CMS-40B) and the employer (you or your spouse's) carries your group health insurance needs to complete form CMS L564/R297. Once both forms are completed, you may fax or mail them together to your local Social Security Office.

- 1) Fax to a Social Security office: **Fort Wayne 1-833-902-2674**; or
Auburn 1-833-950-3709

Fax Completed: Date _____ **Time** _____

1 day later call the Social Security office: **Fort Wayne 1-877-223-6061** or **Auburn: 1-866-829-2170** to confirm your application has been received and is being processed.

Telephone Call Completed: _____ **Time** _____ **Rep** _____

- 2) Mail to the Ft. Wayne Social Security Office, **2122 Lincolnway Court, Fort Wayne, IN 46819.**

Mail Date: _____

5 days later call the Social Security office (**Fort Wayne: 1-877-223-6061 or Auburn: 1-833-950-3709**) to confirm your application has been received and is being processed.

Telephone Call Completed: _____ **Time** _____ **Rep** _____

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