



Initial Medicare Enrollment Checklist

The Medicare Dude™ Resource Library



Use this checklist to stay on track during your Initial Enrollment Period (IEP) and avoid unnecessary delays or penalties.

Before You Enroll

- Confirm your Initial Enrollment Period dates.
- Decide whether you need Medicare Part A and/or Part B.
- Review employer or retiree health coverage.
- Gather a current medication list.
- Prepare a list of physicians and specialists.
- Estimate your healthcare budget.

Enrollment Tasks

- Apply for Medicare if not automatically enrolled.
- Compare Medicare Supplement options.
- Compare Medicare Advantage plans (if appropriate).
- Review standalone Part D prescription drug plans.
- Verify your preferred pharmacy.
- Keep copies of all confirmations.

After Enrollment

- Verify your Medicare effective date.
- Confirm you received all ID cards.
- Schedule your Annual Wellness Visit.
- Store plan documents in a safe place.
- Mark Annual Enrollment (Oct. 15–Dec. 7) on your calendar.

Need Help Enrolling?

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Independent Medicare Broker Since 1998

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