



What to Bring Counseling Document Checklist

Appointment Date: _____

Time: _____

Delaware County Apprise Program

**Please call if you need to cancel 484-494-3769.
(PLEASE ARRIVE 15 MINUTES EARLY TO
YOUR APPOINTMENT)**

Help Us Help You

Below is your checklist. Bring as much info as you can to your APPRISE counseling appointment or enrollment event. That way, we can find the best possible options for your personal situation.

- Your Medicare Card
- Your Pennsylvania ACCESS and Managed Care Identification Cards, if you have Medicaid
- Any other insurance or prescription Drug Cards and Benefit Booklets
- Income Information – Social Security Statements, Pay Stubs, etc.
- Your Asset or Resource Information – Checking, Savings, IRA, 401, B or K, etc.
- Medication Drug List – (Including Medication Dosage, Number of Pills/Month, Pharmacy or Mail Order)
- Any letters about your Insurance Coverage, from:
 - the **Social Security Administration or Medicare** about your eligibility for Extra Help, or changes in your prescription drug coverage
 - the **Pennsylvania Department of Human Services** about changes to your Medicaid Coverage, Medicare Health Plan Premiums, or Prescription Drug Co-pays
 - **your Insurance Company** telling you if your prescription drug coverage is as good as (also called creditable to) Medicare Part D
 - **any others** about Part D Coverage, including letters from your employer, union, or retiree insurance plans.
- A list of any questions you want to remember to ask.