



## 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 (Red, White, and Blue Card or Medicare Advantage HMO/PPO Card)
- Your Pennsylvania ACCESS and Managed Care Identification Cards (HMO), 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 the **Extra Help Program**, or changes in your prescription drug coverage
  - the **Pennsylvania Department of Public Welfare (DPW)** about changes to your Medicaid Coverage, or payments by DPW towards your Medicare health plan premiums, “Part B” Medical Copays or/and Deductibles (**Medicare Savings Program or Buy In Programs**)
  - **your insurance company** telling you if your present prescription drug coverage is a **creditable** Medicare Part D Prescription Plan
  - **any others letters or cards** about Part D Coverage, including letters or cards from your employer/union, PACE (NET), or retiree insurance plans
- A **list** of any questions you want to **remember** to ask.