Your Group Medicare Health Plan Enroll-at-65 checklist

As your birthday approaches, use this checklist to learn what steps to take and when to take them to enroll in Medicare. If you get health coverage through your employer, union, or trust fund, these to-dos will help you confidently choose the right plan for you, meet your enrollment deadline, and avoid costly late enrollment penalties.

Let’s get started: Mark your calendar with your Initial Enrollment Period
Your Initial Enrollment Period is the official time you can enroll in a Medicare health plan. It lasts 7 months – beginning 3 months before your 65th birthday, including the month of your birthday, and ending 3 months after.

4-6 months before you turn 65

☐ Learn about your organization’s Medicare requirements and options. Contact your benefits administrator or check your organization’s website or enrollment materials to find out if they offer a Medicare health plan, if you’ll be automatically enrolled, and more.

☐ Visit kp.org/learnand enrol to learn about Medicare basics. It’s important to know what to look for in a plan and how Medicare star quality ratings can help you compare plans. Watch our helpful online videos, including “Medicare Part B Simplified” and “Group Medicare: 4 Simple Steps.”

☐ Not a Kaiser Permanente Medicare health plan member, but want to enroll? Ask your benefits administrator how to enroll in a Kaiser Permanente Medicare health plan.

3 months before you turn 65

☐ Contact Social Security, enroll in Part B, and request your Medicare card. Confirm your Medicare eligibility and find out the earliest date you can get your card. You’ll need the information on your Medicare card to enroll – and it can take up to 2 months to receive it.

☐ Enroll now – you don’t have to wait until your birthday. If you have your Medicare card, sign up now.

☐ Consider enrolling with online. It’s easy and secure. Visit kp.org/learnand enrol to see if you can enroll online with Kaiser Permanente.

When you turn 65, and up to 3 months after

☐ If you’re retiring at 65 don’t delay. If you retire at 65 and don’t sign up before your enrollment period ends – 3 months after your birthday – you may have to pay a costly, ongoing late enrollment penalty.

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Kaiser Permanente
Questions? We’re here to help.

- **Kaiser Permanente Medicare Learning Center:**
  Visit us at kp.org/learnandenroll to watch videos, read about Medicare basics, or get help planning for your future. You’ll find plenty of resources to learn what you need to know in a way that works for you.

- **Kaiser Permanente licensed sales specialist:**
  Call 1-877-547-4909 (TTY 711), 7 days a week, 8 a.m. to 8 p.m. Our experienced team can answer your questions and help guide you— even if you don’t qualify for Medicare benefits, your organization doesn’t offer them, or you have another special situation.

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### Other helpful resources:

**Medicare:**
Call 1-800-633-4227, 24 hours a day, 7 days a week (TTY 1-877-486-2048).
Visit [Medicare.gov](http://www.medicare.gov).

**Social Security office:**
Call 1-800-772-1213, Monday through Friday, 7 a.m. to 7 p.m. (TTY 1-800-325-0778).
Visit [SocialSecurity.gov](http://www.socialsecurity.gov).

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**Working past 65?** See our Group Medicare Health Plan-Ahead checklist.