

# SmartConnect Pre-Enrollment Checklist

Starting Medicare can be overwhelming. But taking a few simple steps will set you up for a stress-free experience. This form will help you gather the information you'll need to enroll in a Medicare plan.

## Documents

- Medicare Card  Checking Account Number
- Previous Year's Insurance  Routing Number

## Personal Information

Address Line 1

Address Line 2  City / State / Zip

Date of Birth  Social Security Number

Phone Number  Email Address

## Health Care Information

Provider Name	Specialty	Address	Phone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Current Prescription Medications

Medication Name	Dosage	Refill Quantity	Refill Frequency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you are enrolling in plans for dependents, you will need this same information for each dependent.