

## Questions to Ask

1. Get out a client contact sheet to conduct a thorough intake:
  - Are you currently on Medicaid or getting any other adult public assistance?
  - Are you considered disabled?
  - How did you hear about our office/phone number?
  - What is your age category? 65-70, 70-75, or 80+
  - What is your name? zip code? Phone number (in case we are disconnected I will call you back).
  - Are you currently working and have active health insurance through employment?
  - Do you have health insurance through your retirement?
  - Do you have health insurance coverage through a spouse that is working?
  - Do you have health insurance coverage through a spouse that is retired?
  - Do you have VA or tri-care?
  - Establish if Medicare is Primary (pays first).
  - Establish if there is a secondary (spouses, etc).
  - Are you enrolled in Part A (free if you have completed 40 hours of paid work/social security) deductible 1,060 per period?
  - Does your retiree health insurance require that you file with social security for Part B?
  - That they participate with this specific Medicare advantage plan?
    - Yes, refer them to social security
    - No, review benefits of Part B and premiums/deductibles
2. If people ask about Medicare advantage plan:
  - Have you carefully reviewed the benefits summary for the Medicare advantage plan? Have you talked to your doctor to assure that he/she participates?
  - Rx medications: Do you have any other prescription drug coverage?
  - Does your retiree health insurance require you to join a part D drug plan?
  - Are there negative consequences from your other health insurance if you do or don't?