

SelectQuote Pre-Call Checklist



At SelectQuote, we can help you ensure you're getting all the Medicare benefits available to you. We simplify the Medicare process, answer any questions you have about coverage and help you find an affordable plan that meets both your needs and budget.

During your SelectQuote appointment, you'll work with one of our experienced licensed insurance agents who will start by asking some basic information such as your name, phone number, email address and zip code. From there, we'll take the time to get to know your current health situation so we can best compare your options for Medicare coverage.

Before your call, please complete the worksheet below to the best of your ability. This will help ensure a quick and easy appointment to help find you the right coverage.

1 Types of Coverage

There are many options when it comes to Medicare coverage, but we can help narrow down your options to figure out which is right for you. Select which type of coverage(s) you think you'd be interested in ahead of your call. If you're unsure, that's okay, too. Our licensed insurance agents will walk you through your options.

- ☐ Medicare Advantage
- ☐ Medicare Supplement
- ☐ Prescription Drug Plan
- ☐ I don't know

2 Current Insurance

In just minutes, we compare Medicare plans in your area from some of the most trusted insurance companies in the nation. To help your licensed insurance agent accurately compare your options, we'll need some information about your current plan. Use this grid below to compare your current rates to your new rates while working with our team. You can expect to receive official rate and plan details within 14 days of purchase.

	Current Plan	New Plan
Carrier/Plan name		
Monthly Premium	\$	\$
Annual Deductible	\$	\$
Type of plan (HMO, PPO)		

3 Preferred Doctor(s)

One of the most important considerations when choosing a plan is whether or not you'll be able to see your preferred doctors and specialists. Here you can list out your doctors' information so our team can confirm whether or not they accept your new plan.

Doctor's Name	Type of Doctor	Phone Number	Number of visits in the last 12 months

4 Prescription Drugs

Just like your doctors, it's important to ensure your prescription medications are covered by your new plan. Use the grid below so your licensed insurance agent can make sure it's not only covered by your new plan, but that you also are getting it at the best available price.

Name of Drug		Dose		Qty		Your Cost per refill	\$
Name of Drug		Dose		Qty		Your Cost per refill	\$
Name of Drug		Dose		Qty		Your Cost per refill	\$
Name of Drug		Dose		Qty		Your Cost per refill	\$
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5 Consider your Priorities

To help you find a Medicare plan that's right for you, we'll need to know what's most important to you. Select any of the boxes below that you consider to be a priority and be sure to mention these at the beginning of the call with your licensed insurance agent.

- | | |
|---|--|
| ☐ The price of co-pays/co-insurance | ☐ Coverage for specialized services for example: transportation to appointments and over-the-counter benefits |
| ☐ The cost of your annual deductible | |
| ☐ The cost of monthly premiums | ☐ Coverage for specialized drugs |
| ☐ The cost of prescription drugs | ☐ Coverage away from home/while traveling |

6 Get Ready for Your Call

Some Medicare Advantage plans have premiums as low as \$0/month and might also include:

- | | |
|---|-----------------------------|
| • Prescription drug coverage | • Routine hearing checks |
| • Dental and vision benefits | • Over-the-counter benefits |
| • Transportation to and from appointments | • So much more |
| • Health and wellness memberships | |

We want to ensure you have the right coverage for your needs.

While your call with one of our licensed insurance agents will cover a lot of ground, we're here to guide you through the process and answer any questions you have along the way. **Be sure to have your current insurance information and/or Medicare ID card (red, white, and blue card) for the call.** Use the remainder of this page to write down any questions or concerns you have leading up to your appointment.

Agent's Name	
Agent's Phone Number	
Customer Care Contact Info	1-855-443-3709 (M-F 8 a.m.-6 p.m. CT; Sat. 9 a.m.-2 p.m. CT)