



# Checklist for Online Medicare, Retirement, & Spouses Applications

The information below will help you gather the information you may need to create a **my Social Security** account and complete the online Medicare, Retirement, and Spouse's applications. We recommend you print this page to use while gathering your information.

## Create a **my Social Security Account**

You are required to login to your existing **my Social Security** account, or attempt to create one. To create an account, we will ask you a series of identity questions for verification. You may want to have certain items on hand to be prepared for additional security questions, such as, but not limited to: **mobile phone (for the purpose of receiving texts and emails), credit card, W-2, and tax forms.**

<b>File for Benefits Online – The Information You Need</b>	<b>Medicare Only</b>	<b>Retirement &amp; Spouses</b>
<b>Date and Place of Birth</b> If you were born outside the United States or its territories: <ul style="list-style-type: none"> <li>Name of your birth country at the time of your birth (it may have a different name now)</li> <li>Permanent Resident Card number (if you are not a U.S citizen)</li> </ul>	<b>X</b>	<b>X</b>
<b>MEDICAID Number</b> (State Health Insurance) - Start and End Dates	<b>X</b>	
<b>Current Health Insurance</b> <ul style="list-style-type: none"> <li>Employment start and end dates for the current employer (of you or your spouse) who provides your health insurance coverage through a Group Health Plan</li> <li>Start and end dates for the Group Health Insurance provided by you (or your spouse's) current employer</li> </ul>	<b>X</b>	
<b>Marriage and Divorce</b> <ul style="list-style-type: none"> <li>Name of current spouse</li> <li>Name of prior spouse (if the marriage lasted more than 10 years or ended in death)</li> <li>Spouse(s) date of birth and SSN (optional)</li> <li>Beginning and ending dates of marriage(s)</li> <li>Place of marriage(s) (city, state or country, if married outside the U.S.)</li> </ul>		<b>X</b>
<b>Names and Dates of Birth of Children Who:</b> <ul style="list-style-type: none"> <li>Became disabled prior to age 22, or</li> <li>Are under age 18 and are unmarried, or</li> <li>Are aged 18 to 19 and still attending secondary school full time</li> </ul>		<b>X</b>
<b>U.S. Military Service</b> <ul style="list-style-type: none"> <li>Type of duty and branch</li> <li>Service period dates</li> </ul>		<b>X</b>
<b>Employer Details for Current Year and Prior 2 Years (not self-employment)</b> <ul style="list-style-type: none"> <li>View your Social Security Statement online at <a href="http://www.socialsecurity.gov/myaccount">www.socialsecurity.gov/myaccount</a></li> <li>Employer name</li> <li>Employment start and end dates</li> </ul>		<b>X</b>
<b>Self-Employment Details for Current Year and Prior 2 Years</b> <ul style="list-style-type: none"> <li>View your Social Security Statement online at <a href="http://www.socialsecurity.gov/myaccount">www.socialsecurity.gov/myaccount</a></li> <li>Business type</li> <li>Total net income</li> </ul>		<b>X</b>
<b>Direct Deposit - Domestic bank (USA)</b> <ul style="list-style-type: none"> <li>Account type and number</li> <li>Bank routing number</li> </ul>	<b>Direct Deposit - International bank (non-USA)</b> <ul style="list-style-type: none"> <li>International Direct Deposit (IDD) bank country</li> <li>Bank name, bank code, and currency</li> <li>Account type and number, branch/transit number</li> </ul>	
		<b>X</b>