



NON-MEDICARE COUNSELING CHECKLIST

Marketplace Wraparound HRA

For non-Medicare counseling, call UMR at 1-888-236-2377. Be sure to tell the representative that you are a School Employees Retirement System member.

UMR will identify Marketplace plans available in your county and compare premiums, costs, and benefits.

- UMR will help you get enrolled in a Marketplace plan if you select the SERS Marketplace Wraparound HRA option.
- Non-Medicare benefit recipients who want to enroll in Aetna Choice POS II or AultCare PPO must still participate in non-Medicare counseling.



Following counseling and receipt of your SERS health care application, SERS will process your enrollment.

Counseling is not required when enrolling a family member in the Aetna Medicare Plan (PPO). Aetna Choice is the only enrollment option.

Use this checklist to get ready for the call:

- ☐ Will you need single or family coverage? What are the ages for those seeking coverage?
- ☐ Zip code where you live
- ☐ Estimated gross yearly income for the year you're enrolling. Pay stub(s) and your benefit estimate will be helpful.
- ☐ List of your usual doctors and hospitals
- ☐ List of prescription drugs and dosage
- ☐ Date your current health coverage will end



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