

# What You Need To Complete The Application For Extra Help With Medicare Prescription Drug Plan Costs

2012



**S**ocial Security and the Centers for Medicare & Medicaid Services are working together to get you Extra Help with your Medicare prescription drug plan costs. If you have limited resources and income, you may be able to get Extra Help with the costs—monthly premiums, annual deductibles, and prescription co-payments—related to a Medicare prescription drug plan. The Extra Help is estimated to be worth about \$4,000 per year. To find out if you qualify, Social Security will need to know the value of your savings, investments, real estate (other than your home), and your income. If you are married and living with your spouse, we will need information about both of you.

To qualify for Extra Help:

- You must reside in one of the 50 States or the District of Columbia;
- Your resources must be limited to \$13,070 for an individual or \$26,120 for a married couple living together. Resources include such things as bank accounts, stocks, and bonds. We **do not** count your home, car, and any life insurance policy as resources; **and**
- Your annual income must be limited to \$16,755 for an individual or \$22,695 for a married couple living together. Even if your annual income is higher, you still may be able to get some help. Some examples where your income may be higher include if you or your spouse:
  - Support other family members who live with you;
  - Have earnings from work; or
  - Live in Alaska or Hawaii.

## How do I apply?

It is easy to apply for Extra Help. Just complete Social Security's *Application for Extra Help with Medicare Prescription Drug Plan Costs* (Form SSA-1020). Here's how:

- Apply online at [www.socialsecurity.gov/extrahelp](http://www.socialsecurity.gov/extrahelp);
- Call Social Security at **1-800-772-1213** (TTY **1-800-325-0778**) to apply over the phone or to request an application; or
- Apply at your local Social Security office.

## What do I need to know?

The worksheet on the opposite page can help you decide if you are eligible and can assist you in completing the actual application for Extra Help. The worksheet is **not** an application.

To prepare:

- Identify the things you own by yourself, with your spouse or with someone else, but do not include your home, vehicles, burial plots, life insurance policies, or personal possessions.
- Review all your income.
- Gather your records in advance to save time.

## What documents can help me prepare in advance?

- Statements that show your account balances at banks, credit unions, or other financial institutions;
- Investment statements;
- Stock certificates;
- Tax returns;
- Pension award letters; and
- Payroll slips.

## Can State agencies help with my Medicare costs?

When you file your application for Extra Help, you also can start your application process for the Medicare Savings Programs—State programs that provide help with other Medicare costs. Social Security will send information to your State unless you tell us not to on the Extra Help application. Your State will contact you to help you apply for a Medicare Savings Program.

## How can I get more information?

For more information about getting Extra Help with your Medicare prescription drug plan costs, visit [www.socialsecurity.gov/extrahelp](http://www.socialsecurity.gov/extrahelp) or call Social Security at **1-800-772-1213** (TTY **1-800-325-0778**). Social Security representatives are available to help you complete your application. The sooner you apply the sooner you will begin receiving benefits.

If you need information about Medicare Savings Programs, Medicare prescription drug plans, how to enroll in a plan, or

to request a copy of the *Medicare & You* handbook, please visit [www.medicare.gov](http://www.medicare.gov) or call **1-800-MEDICARE (1-800-633-4227; TTY 1-877-486-2048)**. Your State Health Insurance Counseling and Assistance Program (SHIP) also can help answer Medicare questions. You can find your local SHIP contact information in the back of your Medicare handbook, online at [www.medicare.gov](http://www.medicare.gov) under "Help & Support," or you can request it when you call.

We need to know information about your (and your spouse's, if you are married and living together) resources and income:

Resources	Value
Bank accounts, including checking, savings, and certificates of deposit	\$ _____
Stocks, bonds, savings bonds, mutual funds, individual retirement accounts (IRAs), or other investments	\$ _____
Cash at home or anywhere else	\$ _____
Any real estate other than your home	\$ _____

Income	Monthly Amount
Social Security benefits	\$ _____
Railroad Retirement benefits	\$ _____
Veterans benefits	\$ _____
Other pensions or annuities	\$ _____
Alimony	\$ _____
Net rental income	\$ _____
Workers' compensation	\$ _____
Other income (e.g., private or State disability payments)	\$ _____

Income	Annual Amount
Wages	\$ _____
Net earnings from self-employment	\$ _____

You may choose to have someone help you when you do business with Social Security. We will work with that person, just as we would work with you.