



## Medicare Extra Help Worksheet

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**Applying for Extra Help with your Medicare Prescription Drug Plan? Use this worksheet to help prepare your application.**

The Social Security Administration and the Centers for Medicare & Medicaid Services work together to help eligible patients receive extra help with prescription drug costs. To determine your eligibility for Extra Help, the Social Security Administration will need to know your income and the value of your savings, investments and real estate (other than your home).

### **You may qualify for Extra Help if:**

- Your annual income is less than \$17,820 for an individual or \$24,030 for a married couple living together.

Even if your annual income is higher than these figures, you may be eligible to receive extra assistance with your monthly premiums, annual deductibles and prescription co-payments related to a Medicare prescription drug plan.

Some examples of this special exception include if you or your spouse:

- Support other family members who live with you
  - Have employment earnings
  - Live in Alaska or Hawaii
- The value of your resources, such as savings, is less than \$13,640 for an individual or \$27,250 for a married couple living together.

Resources include things as bank accounts, stocks and bonds, but do not include your home, car or life insurance policies.

### **Prepare for Your Application**

Before filling out your application, review your income and identify the things you own by yourself, with your spouse or with someone else. **Do not include your home, vehicles, life insurance policies, burial plots or personal possessions (such as furniture and other personal items).**

Gathering your records in advance will save time. Use this worksheet to help you compile your records and make the application process easier.

**Remember that this worksheet is not an application.**



# Partnership for Prescription Assistance

The Social Security Administration needs to know details about your assets and income (as well as your spouse's if you are married and living together). To begin, collect information about your assets and income and enter values into the worksheet below. Be sure to gather:

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

Assets	Value
Bank accounts, including checking, savings and certificates of deposit	
Stocks, bonds, savings bonds, mutual funds, individual retirement accounts (IRAs)	
Cash at home or anywhere else	
Any real estate other than your home	
<b>TOTAL</b>	

Income	Monthly Amount
Railroad retirement	
Veterans benefits	
Other pensions or annuities	
Alimony	
Net rental income	
Wages	
Self-employment net earnings	
Workers compensation	
Other income	
<b>TOTAL</b>	

*NOTE: Social Security will use the monthly amount of your benefits from their records. You do not need to tell them this information.*



## Partnership for Prescription Assistance

Once you have completed the worksheet, apply for assistance through the Social Security Administration online at [www.ssa.gov/medicare/prescriptionhelp/](http://www.ssa.gov/medicare/prescriptionhelp/), or call 1-800-772-1213 to request an *Application for Extra Help with Medicare Prescription Drug Plan Costs* (SSA-1020).

To learn more about the Medicare Prescription Drug Plan, call **1-800-MEDICARE** (1-800-633-4227) or visit **[www.medicare.gov](http://www.medicare.gov)**.