

Your health is my priority, and helping you find the best Medicare coverage for your needs is an essential part of that. Once Completed, keep this for a personal guide and we can explore your options together!

MEDICARE ANNUAL ENROLLMENT CHECKLIST



It's important to review your Medicare coverage every year to help you decide if you need to make changes to better fit your health care needs during the Annual Enrollment Period (AEP) October 15 - December 7.

1

HEALTH CHANGES

Has my health changed in the last year?

Yes No

Think about your health and lifestyle. Note any changes below.



2

ANNUAL NOTICE OF CHANGE

If you currently have Medicare Advantage, review below:

Benefits being added to your plan:

Benefits being removed from your plan:

Changes to providers in your network:

Changes to in-and-out-of network coverage:

Changes to prescription drug coverage:

3

COVERAGE BENEFITS

Answer each question below to help decide if you need to explore other coverage options

Does my current medicare plan cover my healthcare needs?

Yes No

Note any additional needs:

Are there any plan changes that will impact my healthcare needs?

Yes No

Are my preferred doctors or providers part of my plan?

Yes No

Are the prescription drugs I need on my plan's formulary?

Yes No

Can I get prescription drugs online or via mail?

Yes No

Do I need/want coverage for additional health services (i.e. dental / vision coverage?)

Yes No

If "Yes", can I get these items with my current plan?

Yes No



4

COST & FINANCES

Answer each question below to help decide if you need to explore other coverage options

Have my finances changed in the last year?

Yes No

If applicable, do my monthly plan premiums fit my budget?

Yes No

Can I pay my plan's deductibles, copays, and coinsurance amounts?

Yes No

Are my overall out-of-pocket costs what I expect?

Yes No

5

CONVENIENCE & SERVICE

Answer each question below to help decide if you need to explore other coverage options

Can I easily contact my health plan with questions?

Yes No

Does my plan have online information and resources available to me?

Yes No

Can I pay my plan's deductibles, copays, and coinsurance amounts?

Yes No

