

Medicare Plan Review Checklist

Patient Checklist (Currently Enrolled in Medicare):

Use this checklist to help you prepare for your Medicare plan review with your pharmacist.

Checklist Items	Completed
Familiarize Yourself with the different Medicare enrollment periods: Initial (IEP), Special (SEP), General (GEP), and Annual (AEP)	
Schedule a Medicare Plan Review	
Gather Your Medicare Card	
Collect a List of Current Medications	
Note Any Changes in Your Healthcare Needs	
Bring a List of Current Healthcare Providers	
Review Your Current Medicare Plan Coverage	
Prepare Questions or Concerns to Discuss	
Bring Relevant Documents (medical records, test results, etc.)	
Consider Your Budget and Financial Situation	

- Familiarize Yourself with Medicare Enrollment Periods: Stay informed about the Medicare enrollment periods available to you.
 - Those who have or will be turning 65 enter the Initial Enrollment Period (IEP), lasting 7 months. 3 months before and after their 65th birthday month.
 - A Special Enrollment Period (SEP) may become available in case-by-case circumstances. Scenarios for eligibility may include; moving out of a plan's service area, relocating back to the U.S. after living abroad, employment ends resulting in the end to an employer-provided plan, etc. Please consult the Medicare website for all scenarios.
 - The General Enrollment Period (GEP) runs from January 01-March 31 of each year. This period allows for a patient to enroll if they didn't sign up when first eligible during their IEP and do not meet the requirements for a SEP.
 - During the Annual Enrollment Period (AEP) from October 15 to December 7 of each year, anyone can make changes to their coverage and enroll in a Medicare plan.
- Schedule a Medicare Plan Review: Contact your pharmacist to schedule a Medicare plan review appointment. This will ensure dedicated time to discuss your coverage options.
- Gather Your Medicare Card: Bring your Medicare card to the appointment. It contains important information about your coverage.

- **Collect a List of Current Medications:** Make a list of all the medications you are currently taking, including dosage and frequency. This will help your pharmacist assess prescription drug coverage options.
- **Note Any Changes in Your Healthcare Needs:** Consider any changes in your health conditions, treatments, or upcoming medical procedures. Inform your pharmacist about these changes during the review.
- **Bring a List of Current Healthcare Providers:** Compile a list of your current healthcare providers, including doctors, specialists, and therapists. This information will assist in evaluating doctor networks within different plan options.
- **Review Your Current Medicare Plan Coverage:** Familiarize yourself with the details of your current Medicare plan, including coverage, benefits, and limitations. This will serve as a basis for comparison during the review.
- **Prepare Questions or Concerns to Discuss:** Think about any questions or concerns you have regarding your healthcare coverage. Note them down to ensure they are addressed during the review.
- **Bring Relevant Documents:** Gather any relevant documents, such as medical records, test results, or letters from healthcare providers. These documents can provide additional context during the review.
- **Consider Your Budget and Financial Situation:** Reflect on your budget and financial needs when assessing different plan options. Consider factors like premiums, deductibles, copayments, and out-of-pocket limits.

By completing this checklist, you will be well-prepared for your Medicare plan review. It ensures that you have the necessary information and documents to make informed decisions about your healthcare coverage.