

# Medicare Plan Review Checklist

## Patient Checklist (New Enrollment/Turing 65):

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 Review Appointment	
Gather Personal Information	
Collect Proof of Age and Residency	
Provide Social Security and Other Relevant Numbers	
Prepare a List of Current Medications	
Bring a List of Preferred Healthcare Providers	
Review Your Financial Situation	
Bring Any Relevant Documentation	
Prepare Questions and Concerns	

- 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 Review Appointment: Contact your pharmacist to schedule a Medicare review appointment. Your pharmacist will provide guidance and assistance throughout the enrollment process.

- **Gather Personal Information:** Collect your personal details, including your full name, date of birth, address, and contact information. You'll need this information for the enrollment forms.
- **Collect Proof of Age and Residency:** Gather documents such as your birth certificate or passport to verify your age and residency. These documents may be required during the enrollment process.
- **Provide Social Security and Other Relevant Numbers:** Bring your Social Security number, as well as any other identification numbers that may be required for enrollment.
- **Prepare a List of Current Medications:** Make a list of all the medications you are currently taking, including the dosage and frequency. This information will help your pharmacist assess prescription drug coverage options.
- **Bring a List of Preferred Healthcare Providers:** Compile a list of your preferred healthcare providers, including doctors, specialists, and therapists. This will assist in evaluating different plan options and ensuring your providers are in-network.
- **Review Your Financial Situation:** Reflect on your financial situation and consider any budgetary concerns you may have regarding Medicare premiums, deductibles, copayments, and other healthcare expenses. Your pharmacist can help you assess plan options based on your financial needs.
- **Bring Any Relevant Documentation:** If you have any relevant documentation such as medical records, test results, or letters from healthcare providers, bring them to your review appointment. These documents can provide additional context and help determine appropriate coverage.
- **Prepare Questions and Concerns:** Take the time to prepare any questions or concerns you have regarding your healthcare coverage. Your pharmacist is there to address these during the review and provide clarification on any aspects of the enrollment process.

By completing this checklist, you will be well-prepared for your Medicare review appointment. Your pharmacist will guide you through the necessary steps and assist you in completing the enrollment process. Remember to bring all the required documents and be prepared to discuss your healthcare needs and concerns.