

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)	<input type="checkbox"/>
Schedule a Medicare Plan Review	<input type="checkbox"/>
Gather Your Medicare Card	<input type="checkbox"/>
Collect a List of Current Medications	<input type="checkbox"/>
Note Any Changes in Your Healthcare Needs	<input type="checkbox"/>
Bring a List of Current Healthcare Providers	<input type="checkbox"/>
Review Your Current Medicare Plan Coverage	<input type="checkbox"/>
Prepare Questions or Concerns to Discuss	<input type="checkbox"/>
Bring Relevant Documents (medical records, test results, etc.)	<input type="checkbox"/>
Consider Your Budget and Financial Situation	<input type="checkbox"/>

- 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.