



Your 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

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Health changes

has my health changed in the last year?

☐ Yes ☐ No

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



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



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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 and Finances

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 and Service

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

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!