

# Medicare Annual Enrollment Period checklist

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It's important to review your Medicare coverage every year before the Medicare Annual Enrollment Period (AEP), also known as the Medicare Open Enrollment Period (OEP), October 15–December 7. This checklist can help you prepare as you review your plan options.

## Section 1:

**Has my health changed in the last year?**

Yes  No

**Health changes:** Consider your health and lifestyle. Note any changes below:

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## Section 2:

Review your Annual Notice of Change (ANOC) carefully when you get it in the mail in the fall.

**Items to identify and review:**

Benefits being added to your plan:

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Benefits being removed from your plan:

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Changes to providers in your network:

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

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Changes to prescription drug coverage:

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## Section 3:

**Coverage benefits:** Answer each question below to help decide whether to keep your plan or explore other options.

**Does my Medicare plan cover my current health care needs?**

Yes  No

Note any additional needs below:

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**Will any of the plan changes for the upcoming year impact my health care 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 my prescription drugs online or via mail?**

Yes  No

### Section 3 (continued):

**Do I need/want coverage for additional health services or items (dental/vision)?**

Yes  No

**If “Yes,” can I get these items with my current plan?**

Yes  No

**Is there a rewards program offered?**

Yes  No

### Section 4: Costs and finances

**Have my finances changed in the last year?**

Yes  No

**Do my monthly plan premiums, if applicable, fit my budget?**

Yes  No

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

Yes  No

### Section 4 (continued):

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

Yes  No

**Do I need help paying for Medicare?**

Yes  No

### Section 5: Convenience and service

**Can I easily contact my plan provider with questions?**

Yes  No

**Does my plan have online information and resources I can use?**

Yes  No

**My plan offers special tools and services such as a 24-hour nurse hotline?**

Yes  No



Your health is important and choosing your Medicare coverage is a big part of that. Once completed, make sure to keep this checklist as your personal guide during the Medicare Annual Enrollment Period (AEP) October 15–December 7.

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