

Medicare Plan Review Checklist

Pharmacist Checklist:

Use this checklist to help you prepare for Medicare plan reviews with your patients.

Checklist Items	Completed
Confirm Appointment	
Familiarize Yourself with the different Medicare enrollment periods:	
Initial (IEP), Special (SEP), General (GEP), and Annual (AEP)	
Review the Patient's Current Medicare Plan (If Already Enrolled)	
Evaluate the Patient's Current Healthcare Providers	
Identify Potential Changes	
Research Alternative Medicare Plans	
Prepare Relevant Documentation	

- **Confirm Appointment:** Contact the patient to confirm the Medicare plan review appointment. Ensure that the scheduled time allows sufficient time to thoroughly discuss their options, address questions and concerns, and complete the necessary paperwork.
- **Familiarize Yourself with Medicare Enrollment Periods:** Stay informed about the Medicare enrollment periods available to your patients.
 - 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) typically 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.
- **Review the Patient's Current Medicare Plan (If Already Enrolled):** Take the time to thoroughly review the patient's current Medicare plan, including coverage details, costs, and limitations. Familiarize yourself with the plan's formulary and network to better assist the patient in finding suitable alternatives.

- **Evaluate the Patient's Healthcare Providers:** Compile a list of your patient's current healthcare providers, including doctors, specialists, and therapists. This information will assist in evaluating doctor networks within different plan options.
- **Identify Potential Changes:** Assess the patient's healthcare needs and identify any changes or challenges they may be experiencing. This includes reviewing their medication list, preferred healthcare providers, and any upcoming medical procedures or treatments.
- **Research Alternative Medicare Plans:** Research and explore alternative Medicare plans that may better meet the patient's needs. Consider factors such as coverage, formulary, network, premiums, deductibles, copayments, and maximum out-of-pocket expenses.
- **Prepare Relevant Documentation:** Gather any necessary documentation required for the plan review process, such as the patient's Medicare card, identification documents, and any relevant healthcare information. Having these documents readily available will facilitate a smoother review process.

By completing this checklist, you will be well-prepared to conduct Medicare plan reviews with your patients. Your thoroughness and attention to detail will help you provide personalized guidance and support, ensuring your patients make informed decisions regarding their Medicare coverage.



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.

Medicare Plan Review Checklist

Patient Checklist (New Enrollment/Turning 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.