

Plan Review Checklist



Reviewing your plan and your current healthcare needs every year is important. The Medicare Annual Enrollment Period (October 15- December 7) gives you the opportunity to change your coverage to meet your current needs. This checklist can help you prepare as you review your plan options.

Commented [CF1]:

SECTION 1: Your Health

Has your health changed in the last year?

Yes No

Health Changes: Any medical, lifestyle or concerns

that may affect your health care needs?

Have your prescription drugs changed throughout the year?

Yes No

Are you currently utilizing insulin?

Yes* No

*** If yes, call our office to discuss new programs and our participating plans**

SECTION 2: Annual Notice of Change

Review your Annual Notice of Change (ANOC) carefully when you receive it in the mail. Most all changes can be found in the beginning of the ANOC.

Be sure to review the following topics:

NEW Benefits ADDED to your plan:

Benefits bring REMOVED from your plan:

Changes to providers in your network:

Changes to in- and out- of network coverage:

Changes to prescription drug coverage:

SECTION 3: Coverage Benefits

These questions will help you decide whether to keep your current plan or explore other options.

Will any of the plan changes for next year impact my health care needs?

Yes No

Are my preferred doctors or providers in the network?

Yes No

Are my current prescriptions included on my plan's formulary?

Yes No

Can I get my prescriptions locally or via mail order?

Yes No

Do I need or want coverage for other services such as dental/vision?

Yes No

If yes, can my current plan provide these services?

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SECTION 4: Costs and Finances

Have my finances changes in the last year?

Yes No

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

Yes No

Can I pay my plan deductibles, copays & coinsurance?

Yes No

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

Yes No

Do I need help paying for Medicare? Do I qualify for assistance programs?

Yes No

SECTION 5: Convenience and Services

Can I easily contact my plan provider with questions?

Yes No

Does my plan have an online information resource that I can use?

Yes No

Does plan offers special tools & services such as a nurse hotline?

Yes No

Does my plan offer a rewards program?

Yes No

Based on your answers above, does your current plan meet your health care needs for the upcoming year?

Yes No

WE ARE HERE TO HELP!

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