

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:

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:

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:

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:

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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