

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.