

# 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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