



# Medicare Plan Review Worksheet

It's important to review your Medicare coverage each year. This worksheet can help you see how well your current coverage meets your needs.

Place a check mark next to each statement that is true for you. The more checks, the more likely your plan is working well for you. If there are not many checks, you may want to consider other plan options.

## Coverage

- My plan covers all the health care services I need.

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- My doctors and other health care providers are in my plan's network and accepts my plan's coverage.

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- The specialists I need, are covered by my plan.

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- My prescription medications are on my plan's formulary.

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- My plan has enough to cover my health care needs.

## Cost

- My monthly plan premiums, if applicable, fit my budget.

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- I'm comfortable with my plan's deductibles, co-pays and co-insurance amounts.

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- My overall out-of-pocket health care costs are in line with what I expect and what I am comfortable paying.

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- My plan has a yearly limit on what I may have to pay out-of-pocket. (This feature is not available with Original Medicare.)

## Convenience

- My doctor and pharmacy are easy for me to get to.

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- It's easy for me to order refills of my prescription medications.

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- I'm able to receive my prescription refills by mail, if I want to.

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- My plan has online information and services that I can easily access, if I want to.

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- I'm comfortable with the amount and type of paperwork I need to do with regard to my medical bills and my plan.

## Satisfaction

- I'm happy with my Medicare plan overall.

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- I would recommend my plan to a friend.



Before discussing your Medicare options, Medicare requires a completed Scope of Appointment.

[Click Here to Complete Scope of Appointment](#)

Scope of appointment is the permission to discuss Medicare options, no obligation to purchase