

# Annual Enrollment Period Checklist

## Dates and Deadlines You Need to Know

Medicare is a federal program that offers health insurance to American citizens and other eligible individuals.

Are you enrolling in a Medicare plan? If you are purchasing a Medicare plan for the coming year, or are considering switching plans, here are the critical dates you need to know. Make sure you allocate enough time to evaluate changes to your current plan as well as options with other plans available in your local service area.

There is time to review your needs and select the right plan for you, we recommend contacting your local Medicare broker to learn more.



### Pre-Annual Enrollment Period Begins

Information is available to research all your Medicare options. Read and review your Annual Notice of Change for Medicare Advantage and Part D to identify any changes in your benefits. Speak with an independent Medicare Insurance Broker to learn more should your financial and medical needs have changed.



### Open Enrollment Period Begins

This is the first official day you can make changes to your Medicare benefits for the upcoming year. Learn as much as possible to ensure you have the right plan for you. No applications before October 15<sup>th</sup> will be honored.



### Annual Enrollment Period Ends

Any changes you want to your benefits must be submitted in order to go in to effect for the upcoming year. Do you need any last-minute help? Contact us to make sure your changes are submitted on time.



### First Date Coverage Can Start

Any changes you make will take effect on this date.



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To best prepare for your Annual Election Period, you will want to complete the following tasks:

- Be on the lookout for your Annual Notice of Change document relating to your existing Medicare Part D or Medicare Advantage plan and make sure you read completely for changes in the upcoming plan year.
- Prepare a list of your medications including frequency, dosing limits and quantity purchase, and where from (retail or mail order).
- Prepare a list of current medical providers including all primary and specialists.
- Gather receipts or statements to determine out of pocket costs for the current year.
- Note and special or specific services you are using or seeking to add to your benefits package. This includes dental, vision, hearing aids, transportation, and gym memberships.

If you are first time enrolling In Medicare Advantage you will need to have Medicare Parts A and B active. For Part D, you will need to be enrolled in Part A but not necessarily Part B.

- Assess eligibility - are you eligible to enroll in new plans?
- Assess Coverages and costs - Review out of pocket costs from current year and determine if they were within your budget or you'd like to reduce out of pocket expenses.
- Review options and evaluate other options offering similar coverage or determining if combining coverages would be beneficial.
- Evaluate Star ratings to determine quality indicators of the various plans you are considering.
- Contact providers to ensure they are a participating provider in the plans being considered.
- Remember the goal is to identify the plan or plans that provide you the quality of medical care you seek at a budget you can afford.

## About Medicare Portal

Whether it's a one-on-one meeting or at one of our monthly educational events, we will make sure your Medicare needs are specifically addressed and resolved. We realize that Medicare can be both complicating and confusing, so let us share your journey and work together towards a successful Medicare experience.



Choosing a health plan is an important decision.  
Reach out to us for a complimentary consult.  
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