

Your Medicare Plan Review

A preparation checklist. One folder, a few lists, your next questions.

Review date: _____ Plan year to check: _____

Gather your paperwork

- ☐ Current plan notices, including the Annual Notice of Change if applicable
- ☐ Current coverage information and the plan contact details you need

Make your lists

- ☐ Medication names, doses and frequency; pharmacies you use
- ☐ Doctors, facilities and services to ask about
- ☐ Questions about costs, coverage or changes for the coming year

Choose your next step

- ☐ Use official Medicare information or speak with a SHIP counselor
- ☐ Record what remains unanswered and who you will ask

My questions / next action

Annual Open Enrollment: October 15 - December 7; changes generally begin January 1.

First enrollment and Medigap have different rules. This sheet does not select a plan.

Keep completed notes private. Do not post medicines or personal identifiers online.

Sources checked October 4, 2026: Medicare.gov Open Enrollment and ANOC guidance.

Official guidance: [medicare.gov/health-drug-plans/open-enrollment](https://www.medicare.gov/health-drug-plans/open-enrollment) | [shiphelp.org](https://www.shiphelp.org)

Free Ellis resource, separate from the book worksheets. No purchase or sign-up required.

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