Skyline Benefit

Medicare Appointment Preparation Checklist

Use this printable checklist before a Medicare conversation or plan review.

NAME _____ APPOINTMENT DATE _____ ZIP CODE _____

01 Confirm your timing and current coverage

- [ ] Month and year you turn 65
- [ ] Medicare Part A and Part B effective dates, if known
- [ ] Expected retirement or employer coverage end date
- [ ] Current employer, retiree, COBRA, marketplace, or military coverage
- [ ] Whether you or an employer contributes to an HSA
- [ ] Any enrollment or coverage notices you received

02 Bring the details that shape a plan comparison

- [ ] Medicare card or application status
- [ ] Current insurance cards
- [ ] Primary doctor and specialists
- [ ] Preferred hospitals and medical groups
- [ ] Prescription names, dosages, and refill frequency
- [ ] Preferred retail and mail-order pharmacies
- [ ] Travel plans or a second residence
- [ ] Monthly budget and coverage priorities

03 Questions to answer before changing coverage

- [ ] Will my doctors, medical group, and preferred hospitals be available?
- [ ] How are my prescriptions covered, and which pharmacies are preferred?
- [ ] What could I pay in premiums, copays, coinsurance, and annual out-of-pocket costs?
- [ ] When should my old coverage end and my Medicare coverage begin?

Notes and questions for my advisor