

# Medicare Annual Review

10 questions to guide your client conversation

Record changes, priorities and items to verify for the coming plan year.

Client: \_\_\_\_\_ Review date: \_\_\_\_\_

Agent: \_\_\_\_\_ Plan year: \_\_\_\_\_

Current coverage / plan: \_\_\_\_\_

**01 Are all of your doctors still the same?**

Primary care physician, practice location and any provider changes.

**02 Have you started or stopped taking any medications?**

List drug names, dosages, frequency and brand / generic changes.

**03 Which pharmacy do you use now?**

Record location, mail-order use and preferred pharmacy status to verify.

**04 Have you added any specialists or other providers?**

Include ongoing therapy, treatment teams and new referrals.

**05 Which hospital or health system would you want to use?**

Record preferred facilities and network status to verify.

**06 Do you travel or spend part of the year somewhere else?**

Note destinations, length of stay and routine care needed away from home.

**07 Which benefits did you actually use this year?**

Ask about dental, vision, hearing and other benefits that matter to the client.

**08 Have premiums or other health care costs become a concern?**

Review deductible, copays, drug costs and maximum out-of-pocket limits.

**09 Has anything changed with your health or expected care?**

Note anticipated procedures, treatments or changes in ongoing care.

**10 If you could change one thing about your coverage, what would it be?**

Record the client's main frustration or priority for the year ahead.

## AGENT FOLLOW UP / ITEMS TO VERIFY