



PRIVATE PREPARATION · 1 OF 2

Your coverage, organized.

Prepare the information that makes a review useful. Keep this worksheet with your own records; it is not an application or a request for contact.

Do not write Medicare numbers, Social Security numbers, passwords or detailed medical records here. Keep medication and provider details in separate private records.

01 · Your starting point

- ☐ Identify your Medicare parts, exact plan name and effective dates.
- ☐ Identify VA, TFL, CHAMPVA or other coverage that actually applies to you.
- ☐ Decide whether you are starting Medicare, reviewing a plan or trying to use a current benefit.

02 · What matters most to you?

- ☐ Doctors, facilities and ongoing treatment you want to keep.
- ☐ Prescription coverage and the pharmacies you use.
- ☐ Costs, additional benefits, travel or a specific coverage question.

My top priorities or questions (no personal identifiers)

A good review compares relevant options against your real starting point. An added benefit alone does not establish that changing plans is right for you.

Official sources · checked September 16, 2026

[Medicare: Original Medicare and Medicare Advantage compared](#)

[Medicare: Understanding health plan costs](#)



PRIVATE PREPARATION · 2 OF 2

A comparison you can use.

Record what needs checking, who will answer it and the next action. Do not cancel existing coverage based only on a preliminary discussion.

03 · Compare the complete arrangement

- ☐ Check exact doctors, facilities, prescriptions and pharmacy rules.
- ☐ Compare premiums, likely service costs and medical out-of-pocket exposure.
- ☐ Read benefit limits, supplier rules and any required approvals.
- ☐ For TFL or CHAMPVA, separately check claims and prescription consequences.

04 · Confirm the timing and next step

- ☐ Identify the applicable enrollment opportunity and proposed effective date.
- ☐ Check Medigap rights before dropping a policy.
- ☐ Separate a current coverage dispute or appeal deadline from a future plan review.
- ☐ Keep the comparison, written confirmations and follow-up instructions.

Next action / responsible program or person / date to follow up

Reading or printing this worksheet does not submit information, arrange a call or enroll you.

[See sample review summaries online](#)

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[Medicare: Special Enrollment Periods](#) [Medicare: Changing a Medigap policy](#) [TRICARE: Medicare Advantage and TRICARE For Life](#)
[Veterans Affairs: Meds by Mail and other prescription insurance](#)