Part D Open Enrollment Period: “To-Do” Checklist for Benefits Counselors

Prior to meeting your client:

☐ Ask the beneficiary to bring or have available all cards and letters (e.g., Annual Notice of Change, reassignment, loss of deemed status).

☐ Ask client to bring a list of drugs currently taken, including the strength and dosage; suggest bringing a printout from the pharmacy.

During your meeting:

☐ Review pertinent sections of current plan’s Annual Notice of Change (ANOC).

☐ When running a comparison by cost, be sure to print out and highlight appropriate information on alternative plans.

After meeting with your client:

☐ Give the client a checklist to note date of receipt from plan of:
  - Membership card
  - Explanation and use of transition fills

☐ Check with beneficiary about any need for formulary exceptions or whether any of their medications are indication-based on the plan formulary (i.e., covered for one condition and not another)

☐ Remind beneficiary you are available to respond to questions or problems

☐ Give beneficiary your contact info
Open Enrollment Worksheet: Gather Information

Beneficiary’s name: ____________________________________________

Name of beneficiary’s 2021 Part D plan:
______________________________________________________________

- Plan Membership Number:
  Check one: ☐ PDP ☐ MA-PD ☐ None – in other creditable coverage (see below for more info)

Beneficiary’s membership numbers and effective dates from all other membership cards:

- Medicare Number □□□□□□□□□□□□□□□□□□□□□ (new card # format)
  Part A Effective Date □□-□□-□□□□
  Part B Effective Date □□-□□-□□□□

- Social Security Number
  ☐ Same as Medicare number OR SSN □□□□□□□□□□□□□□□□□□□

- Medigap
  Policy Name __________________    Policy Number____________________

- Other prescription drug coverage?
  Name of Policy:
  ____________________________
  ____________________________

➢ Is the other prescription drug coverage:
  ☐ Employer-sponsored health insurance
  ☐ FEHBP
  ☐ VA or TRICARE
  Name of Policy:
  ____________________________
  ____________________________

** Is this “other” coverage creditable drug coverage? Yes ☐ No ☐
Current Medications List:

<table>
<thead>
<tr>
<th>Name of Drug</th>
<th>Generic? (Y/N)</th>
<th>Strength and dose (Ex: 30 mg taken twice a day)</th>
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- Review pertinent sections of current plan Annual Notice of Change (ANOC)

- Record how costs will change for the beneficiary in 2022:
  
  Premium: 2021: _____ 2022: ______
  Deductible: 2021: _____ 2022: ______
  Copay/coinsurance: _______________________

Is the formulary changing in 2022? If yes, for which drugs?
________________________________________________________
________________________________________________________
Screen and Assess Options, 4-Step Process

Step 1: Screen for LIS & MSP – run thru BenefitsCheckUp®

- Is the beneficiary enrolled in LIS/Extra Help in 2021? □ Yes □ No
  (Note: Can check status in Medicare Plan Finder if client has a registered MyMedicare.gov account and log-in)

- If not enrolled, is the beneficiary willing to screen for eligibility? Yes □ No □

  ➢ If yes, record the following information:
    Monthly Income: $____________
    Resources: ______________________________________________________
    Marital status: Single □ Married □
    Living arrangement: Alone or with spouse □ In another’s household □
    Living in congregate setting □ Nursing home □

Step 2: Use the Medicare Plan Finder tool

  ➢ Baseline: Current plan (refer to Current Medications List on page one)
    a. Coverage in 2022 for current drugs in current plan
    b. Pharmacy: ___________________________ In network? Yes □ No □

Step 3: Discuss MA-PD vs. PDP

Step 4: Run comparison by cost, drug coverage, and utilization management

How Beneficiary is Enrolled (no later than December 7, 2021):

Date of enrollment: ________________________________

☐ Plan Finder
☐ Paper application mailed to plan
☐ Enrollment confirmation number

  Note: Can print out and give a copy to beneficiary, retaining a copy in your file
☐ Call plan

  Note: Not recommended as no way to retain proof of enrollment action

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