

Help465 Medicare Planning Worksheet

My Medications & Pharmacy Planner

Estimated Time: 15–20 Minutes

Purpose:

Keeping an accurate list of your medications is one of the most important steps in preparing for Medicare. This worksheet helps you organize your prescriptions, pharmacies, and medication-related questions before comparing Medicare coverage or meeting with a Medicare advisor.

Step 1 — My Preferred Pharmacy

Primary Pharmacy

Address

Phone Number

Do I use Mail-Order Pharmacy?

☐ Yes

☐ No

If yes, which one?

Help465 Heads-Up

Always bring an up-to-date medication list when reviewing Medicare plans.

Prescription drug coverage can vary from plan to plan, and having an accurate list helps ensure you're comparing options based on your actual needs.

Step 2 — My Current Medications

Medication	Why I Take It	Dosage	How Often?

Need more space?

Attach another page if necessary.

Medicare Minute

Even one medication can make a difference when comparing Medicare prescription drug coverage.

An accurate medication list helps you make more informed decisions.

Step 3 — My Medication Changes

Have any of your medications changed during the past year?

☐ Yes

☐ No

If yes, describe the changes.

Step 4 — Medications I No Longer Take

Medication

Reason It Changed

Medication

Reason It Changed

Step 5 — Questions About My Prescriptions

Use this space to write down anything you'd like to ask your doctor, pharmacist, or Medicare advisor.

Step 6 — Medication Review Checklist

Before comparing Medicare plans:

- ☐ My medication list is current.
- ☐ I know the dosage for each medication.

- ☐ I know how often I take each medication.
 - ☐ I know my preferred pharmacy.
 - ☐ I've written down any medication questions I have.
 - ☐ I'm prepared to review prescription drug coverage.
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My Medication Snapshot

How many prescription medications do I currently take?

Do I take any specialty medications?

☐ Yes

☐ No

Do I regularly use over-the-counter medications?

☐ Yes

☐ No

Do I receive medication assistance from any program?

☐ Yes

☐ No

If yes:

Reflection

Think about your medication list.

Is it current?

Would someone else be able to understand it if they needed to?

Keeping an organized medication list isn't only helpful when comparing Medicare plans...it can also be valuable during doctor visits, emergencies, or pharmacy consultations.

Final Reminder

Medication needs change over time.

Review this worksheet regularly and update it whenever your prescriptions change.

An accurate medication list helps support better conversations, better planning, and more informed Medicare decisions.

Need Help?

Your medications are an important part of choosing Medicare coverage.

When reviewing your options, Help465 can help you compare plans based on your actual prescription needs...not just general information.

Because every Medicare decision should be built around your healthcare...not someone else's.