

Help465 Medicare Planning Worksheet

My Doctors & Healthcare Provider Planner

Estimated Time: 15–20 Minutes

Purpose:

Your healthcare providers are one of the most important factors to consider when comparing Medicare coverage. This worksheet helps you organize your doctors, specialists, hospitals, and healthcare priorities before reviewing your Medicare options.

Step 1 — My Primary Care Physician

Primary Care Physician

Practice Name

Phone Number

Address

How long have I been seeing this provider?

Medicare Minute

For many people, keeping trusted healthcare providers is just as important as comparing monthly premiums.

Step 2 — My Specialists

Specialty	Doctor's Name	How Often Do I Visit?

Need more space?

Attach another page if necessary.

Step 3 — My Preferred Hospitals

Hospital

Hospital

Urgent Care Center

Other Healthcare Facility

Help465 Heads-Up

Before enrolling in a Medicare plan, always verify that your preferred doctors, specialists, hospitals, and other healthcare providers participate with the plan you're considering.

Provider participation can change over time, so it's important to confirm current information before making a decision.

Step 4 — My Healthcare Priorities

What's most important to me?

Check all that apply.

- ☐ Keeping my current primary care physician.
 - ☐ Keeping my specialists.
 - ☐ Access to a preferred hospital.
 - ☐ Nationwide provider flexibility.
 - ☐ Coordinated care.
 - ☐ Access to specialists.
 - ☐ Convenience of nearby providers.
 - ☐ Other
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Step 5 — Providers I Would Like to Keep

If changing doctors would be difficult, list them here.

Step 6 — Questions About My Providers

Write down any questions you'd like answered.

Step 7 — Provider Review Checklist

Before comparing Medicare plans:

- ☐ My provider list is current.
- ☐ I know which providers are most important to me.
- ☐ I've listed my preferred hospitals.
- ☐ I've written down my provider questions.
- ☐ I'm prepared to verify provider participation before enrolling.

My Healthcare Snapshot

How many doctors do I regularly see?

How many specialists?

Do I regularly travel outside my local area?

- ☐ Yes
- ☐ No

If yes, where?

Is keeping my current providers one of my highest priorities?

- ☐ Yes

☐ No

Reflection

Think about your healthcare needs.

Would changing doctors be easy...or difficult?

Which providers know your medical history best?

Understanding your priorities now can help you compare Medicare options more thoughtfully later.

Final Reminder

Your healthcare team may change over time.

Review this worksheet regularly and update it whenever you begin seeing a new provider, stop seeing a provider, or move to a new area.

An accurate provider list helps support better planning and more informed Medicare decisions.

Keep This Worksheet

Healthcare needs evolve over time.

Review and update this worksheet regularly...especially before your Annual Medicare Review, after changing providers, or whenever your healthcare needs change.

Keeping your information current makes future Medicare decisions easier and helps ensure you're prepared for important healthcare conversations.