

2022 Shopping Instructions

- ▶ Medicare Annual Election Period (also known as Open Enrollment) is **October 15 to December 7th**. We start shopping **October 15**.
- ▶ This is the **best time** to review your **Part D** or **Medicare Advantage Plan** and make changes as needed (even if you just enrolled).
- ▶ **Now** is the **best time** to explore whether a **Medicare Advantage Plan** is right for you. We can help.



IMPORTANT NEWS

- ▶ **COVID-19: Our office is open and functioning. Several employees are working remotely. We are avoiding any face-to-face contact, if possible. We can do Zoom meetings and, for exceptional cases, we can meet in an outdoor setting. If you drop something off, please wear a mask and maintain social distance.**
- ▶ **This year, we are requiring access to your my.medicare.gov account, username and password, or your permission to set up an account for you.** This access allows us to save your drug list, from year to year, and eliminates the need for us to type in every drug, every time we shop. For many clients, we set up this account last year. If you do not know the username or password, just write a question mark in those fields. **You can help us by updating your list on my.medicare.gov.**
- ▶ You should have received your Annual Notice of Change (ANOC) from your Part D plan or Medicare Advantage plan. Please review this document and note any significant changes.
- ▶ Several Part D plans are closing, and clients will be automatically migrated to new plans. For some of our clients on **Elixir, Wellcare, Anthem** and **Express Scripts** Part D plans, you will almost certainly want to change. **Humana Walmart** and **Silverscript Choice** plans are having some significant changes as well.
- ▶ There's a new Medicare Advantage plan that has a Medicare Part B "give back" of \$125/mo. This is the first time we've seen one of these plans that we think it might be a good value for our clients. UCLA and Cedars are **NOT** in the network for this plan.
- ▶ Paul will be doing several **webinars** during this Annual Election Period. Please go to pdinsure.com/events for the schedule and how to sign up. We also have recorded webinars available at pdinsure.com/videos. Consider signing up for our website's Medicare News postings at pdinsure.net/subscribe.
- ▶ **Please see your doctors sooner rather than later**, in case there are possible changes in your medications. If you call in to change your drugs, you will get moved to the back of the line (sorry!). If you are going on vacation during the Annual Election Period, please let us know the dates and be sure to get your forms in early.
- ▶ **Annual Election Period is like tax season for accountants.** This is an enormous task. We appreciate your cooperation in giving us **everything we request**. This allows us to do the job right and makes it easier for everyone. Please be sure to fully complete the attached forms as legibly as possible. Many agents do not offer this service.

EACH PERSON SHOULD SEND BACK THREE (3) FORMS TO PAUL

Return the following to us:

- 1 **Drug List with Changes***
- 2 **2022 Shopping Form**
- 3 **New Scope of Appointment Form**

**On the Drug List, if there are no changes, write "NO CHANGES." If you are not taking any prescriptions, write "NO DRUGS." Cross off drugs you are no longer taking.*

- ▶ We are not able to start shopping until **October 15** and we process in the order received.
- ▶ Return by **November 1** or we may not get to you.
- ▶ **Completely fill out, sign & date forms.**

RETURN OPTIONS:

MAIL: With included return envelope.

FAX: To 818 993 1497 using a secure fax machine (not a public machine).

ONLINE: Scan/email using my secure link at pdinsure.com/uploads.

IN PERSON: On our porch or curbside at 17347 Napa St., Sherwood Forest, CA 91325.
(COVID-19 Safeguards in effect)

RETURN THE FORMS TO PAUL ASAP, BUT NO LATER THAN 11/1/21

