

Annual Healthcare Review Checklist

Use this checklist to review healthcare needs together and prepare for the year ahead. Completing an annual review can help families feel more confident and organized as care needs evolve.

Coverage & Planning	
	Review current Medicare and any supplemental insurance coverage.
	Confirm prescription coverage and out-of-pocket costs.
	Identify coverage gaps that may require additional support.
Medications & Providers	
	Update a complete list of medications, dosages and prescribing providers.
	Confirm preferred doctors, specialists and pharmacies.
	Review refill schedules and medication management needs.
Support Needs & Daily Routines	
	Discuss any changes in mobility, energy or daily routines.
	Identify nonmedical support needs (personal care, transportation, reminders).
	Consider whether support needs may change in the coming year.
Wellness & Preventive Care	
	Schedule annual wellness visits and routine screenings.
	Review vision, hearing and dental care needs.
	Discuss wellness goals related to activity, nutrition and social engagement.
Care Coordination & Communication	
	Update emergency contacts and health documents.
	Review how care is coordinated with outside providers.
	Identify who will communicate with providers if needs change.
Next Steps	
	Save key documents in an accessible place.
	Set a reminder to revisit this checklist next year.
	Contact a Solstice community near you with questions about what independent living can look like for you.