

Determination of Primary Insurance when Patient is Entitled to Medicare Part B

Medicare will be primary when a patient with Medicare Part B has no other insurance, has Medigap Supplemental Insurance, has Medicaid in addition to Medicare, and/or is in one of the following situations:

Please place a checkmark next to the ONE statement of the following that is true for you:

1. I am 65 or over, fully retired, and my spouse is also fully retired. _____ Medicare is primary.
Date of Retirement: _____ Date of Spouse's retirement: _____
2. I am 65 or over, fully retired, and my spouse works for a company with LESS than 20 employees. _____ Medicare is primary for me.
3. I am 65 or over, and work full time or part-time for a company with LESS than 20 employees. _____ Medicare is primary for me.
4. I am under 65, am disabled, and I do not have primary coverage with a large group health plan because I do not have nor does a family member have "current employment status" *. _____ Medicare is primary for me.
5. I am a Veteran entitled to Medicare, and I may choose either the VA or Medicare to be responsible for payment of services covered by both programs.
 - A) If I choose Medicare, Medicare is primary for me. It is not necessary to submit a claim to the VA for denial before sending to Medicare.
 - B) If I choose the VA, Medicare is 2nd and the VA must authorize all hospital services.

Medicare will be Secondary Payor for a patient with Medicare Part B when:

- A. I am 65 or over, fully retired, and my spouse works for a company with MORE than 20 employees. _____ Medicare is second for me.
- B. I am 65 or over, and I work full time or part-time for a company with MORE than 20 employees. _____ Medicare is second for me.
- C. I am under 65, am disabled, and I have primary coverage through a Large Group Health Plan. _____ Medicare is second for me.
- D. I have End Stage Renal Disease. My Medicare coverage began _____. Medicare is second for me for the first 18 months or 30-month coordination period.
- E. I am entitled to Black Lung Benefits. Medicare is second for me only if treatment of lung conditions caused from mining.
- F. I was injured in an accident _____ Auto _____ Work _____ Home _____ Other. Detailed billing information will be requested separately. Medicare is second for me.

* "Current Employment Status" means that an individual is actively working as an employee; the employer, or is associated with the employer in a business relationship.

By completing this questionnaire and signing below, I acknowledge that _____ has made a good faith effort to determine whether any other insurance is primary to any Medicare coverage that I may have.

Beneficiary's Name
(Printed)

Date

Beneficiary's Signature