

Medicare Enrollment Rules

ALREADY COLLECTING SOCIAL SECURITY RETIREMENT BENEFITS

- If a client is already collecting their Soc Sec benefits i.e. they retired at age 62 or 63
- Then they are AUTOMATICALLY enrolled into Medicare

APPLYING FOR SOCIAL SECURITY & MEDICARE WHEN THEY TURN 65

- When they apply for Soc Sec at 65 they can then apply for Medicare Parts A & B at the same time with the Medicare eff the first day of their birth month
- They can enroll for Social Security 3 ways
 1. online at ssa.gov
 2. Call the FDL Soc Sec office at 888-717-1526 to set a telephone appt to enroll
 3. Call the FDL Soc Sec office at 888-717-1526 to set an in person appt to enroll

APPLYING FOR MEDICARE PARTS A & B ONLY AT AGE 65

- Enroll online at <http://www.socialsecurity.gov/medicare/apply.html>
- When asked the question “are you applying for Part B?” answer YES
- Call the FDL Soc Sec office at 888-717-1526 to set an appt to enroll

APPLYING ONLY FOR MEDICARE PART A ONLY

- Enroll online at <http://www.socialsecurity.gov/medicare/apply.html>
- When asked the question “are you applying for Part B?” answer NO
- ONLY applying for Part A
- If they have an HSA plan they can NOT apply for either Parts A or B
- Call the FDL Soc Sec office at 888-717-1526 to set an appt to enroll

APPLYING FOR PART B POST 65 WHEN THEY ALREADY HAVE PART A

- Need the employer to fill out the “Verification of Income” form CMS L564
- Client fills out and signs the Application for Part B form CMS 40B
- Take or send BOTH forms to local Soc Sec office
- Get DATE STAMPED copies with name of person that took the forms
- Filling out these forms avoids the Medicare Part B Late Enrollment Penalty

DISENROLLING FROM MEDICARE PARTS A AND/OR PART B

- Fill out the “Request for termination of Premium Hosp” form CMS-1763
- Take or send the form to local Soc Sec office
- Get DATE STAMPED copies with name of person that took the forms



Insurance
Financial
Medicare

131 N Rolling Meadows Dr., Suite A
Fond du Lac WI 54937

Phone: (920) 921-7526 Email: info@goebelins.com Website: goebelins.com