

Information partners can use on:

## Changes in qualifying for Extra Help

Each year, Medicare and Social Security determine whether some people who qualify for Extra Help will continue to qualify the following year. Medicare or Social Security will mail information to people whose Extra Help status is changing.

### People who no longer automatically qualify for Extra Help

Medicare and Social Security work together to mail notices (on grey paper) to people who will no longer qualify automatically for Extra Help. These notices explain why a person no longer qualifies automatically and encourage them to complete an enclosed application for Extra Help. They can return the application to Social Security in the enclosed, postage-paid envelope. People who are affected will get these notices by the end of September.

People will no longer qualify **automatically** for Extra Help because they no longer have one of these:

- Both Medicare and Medicaid (full-benefit dual-eligible)
- Help from Medicaid paying Medicare Part B premiums (Medicare Savings Program)
- Both Medicare and Supplemental Security Income (SSI)

You should encourage these people to **apply** for Extra Help with Social Security or their State Medical Assistance (Medicaid) office. Applying early is important so their Extra Help can be effective as early as January 1 (the date their automatic eligibility ends). You can help people complete an application online at [socialsecurity.gov/i1020](https://socialsecurity.gov/i1020), or you can help complete and mail the paper application they got in the mail.

If a person's situation changes and they again qualify automatically for Extra Help, Medicare will send them another notice (on purple paper) letting them know they qualify.

## People who continue to qualify automatically for Extra Help, but with a change in copayment level

Medicare is also mailing notices (on orange paper) to people who will continue to qualify automatically for Extra Help, but will have a change in copayment levels starting January 1. Medicare will mail these notices by early October to let people know their copayment level.

The change in copayment level could result when a person with Medicare changes from one of these categories to another:

- Institutionalized with Medicare and Medicaid
- Has Medicare and Medicaid
- Has Medicare and Medicaid and a change in income level
- Gets help from Medicaid paying Medicare Part B premiums (belongs to a Medicare Savings Program)
- Gets Supplemental Security Income (SSI)

For example, if a person with both Medicare and Medicaid no longer lives in a nursing home, they may no longer qualify for a \$0 copayment starting January 1.

**Note:** Medicare won't send a notice to people with no changes who continue to qualify automatically for Extra Help.

## For more information about Medicare's notices

People who have questions about Medicare prescription drug coverage, or people who think they received a notice in error should call 1-800-MEDICARE (1-800-633-4227). TTY users should call 1-877-486-2048. They should let Medicare know they got an orange or grey notice when they call. Because CMS doesn't discriminate in its programs and activities, people can request notices in alternative formats by calling 1-800-MEDICARE or emailing [AltFormatRequest@cms.hhs.gov](mailto:AltFormatRequest@cms.hhs.gov).

## People who applied and qualified for Extra Help

Social Security is reviewing the eligibility of selected people who applied and qualified for Extra Help to make sure they're still eligible and getting the correct amount of Extra Help. Social Security will mail these people a notice at the end of August with an "Income and Resources Summary" telling them what Social Security's records show for their income, resources, and household size. (A cost of living increase in a person's Social Security payments won't be considered a change in their situation.)

## People who applied and qualified for Extra Help (continued)

People who get this notice will fill out the enclosed eligibility form called “Social Security Administration Review of Your Eligibility for Extra Help” (Form 1026-SM-REDE) and return the form within 30 days. **If they don’t return the form, their Extra Help may end.**

Social Security will review the eligibility review forms and send letters explaining the decision. Social Security may decide one of these:

- There’s **no change** in the person’s Extra Help
- There’s **an increase** in the amount of the person’s Extra Help
- There’s **a decrease** in the amount of the person’s Extra Help
- The person **no longer qualifies** for Extra Help

Any change to the amount of Extra Help a person qualifies for could be effective as early as January, unless their marital status or marital living arrangements changed. Changes in marital status or marital living arrangements may result in changes to the amount of Extra Help in the following month, or later if the spouse died.

Anyone who believes Social Security’s decision is incorrect has the right to appeal it. The decision letter will explain the person’s appeal rights.

**Note:** People who don’t get Social Security’s eligibility review form (1026-SM-REDE) will continue to qualify for Extra Help. They won’t get a separate notice from Social Security.

## For more information about Social Security’s mailings

- Visit Social Security at [socialsecurity.gov](https://www.socialsecurity.gov).
- Call Social Security at 1-800-772-1213. TTY users should call 1-800-325-0778. Callers should let Social Security know they received a letter when they call.

