

DEPARTMENT OF HEALTH & HUMAN SERVICES  
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## **MEDICARE ENROLLMENT AND APPEALS GROUP**

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**Date:** May 19, 2020

**To:** All Medicare Advantage Organizations, Medicare Advantage - Prescription Drug Plans and Part D Sponsors

**From:** Jerry Mulcahy, Director  
Medicare Enrollment and Appeals Group

**Subject:** Medicare Beneficiary Identifier (MBI) Plan Lookup Tool

In accordance with section 501 of the Medicare Access and CHIP Reauthorization Act (MACRA) of 2015 (PL 114-10), CMS removed Social Security number-based Health Insurance Claim Numbers (HICNs) from Medicare cards and reissued Medicare cards with Medicare Beneficiary Identifiers (MBIs). As of January 1, 2020, CMS rejects transactions submitted with HICNs.

CMS has created a secure web-based MBI Plan lookup tool in the Medicare Advantage Prescription Drug System (MARx) on the M232 beneficiary eligibility screen. This functionality has been added to the existing beneficiary ID field, which will remain unchanged. The MBI Plan lookup tool provides authorized users the ability to obtain an individual beneficiary's MBI. Although Plans are expected to have contact with a beneficiary and obtain their MBIs for enrollment purposes, CMS is providing Plans the ability to look up a beneficiary's MBI in cases where it will allow them to provide a better beneficiary customer service experience during the enrollment process. CMS solicited feedback from the Plan community, and appreciates the comments and suggestions it received regarding the development of this tool. CMS has considered and has incorporated the feedback in the final release.

CMS will use the following information to return an MBI; please note all of the search criteria below are required entries:

- First name (or first letter of first name)
- Last name (or first six (6) letters for last names longer than six letters)
- Date of birth
- HICN, **or** beneficiary's Social Security number, **or** a portion of the MBI (minimum of three (3) characters)

Screen shot example:

Beneficiary: Eligibility (M232) Role: MCO REPRESENTATIVE Date: 4/29/2020

Either a Beneficiary ID OR a combination of First Name, Last Name, Date of Birth, and a SSN/HICN or partial MBI is required.  
\*Indicates at least one of these is required

+Beneficiary ID  
+  
First Name  
Last Name Suffix  
Date of Birth  
MM/DD/YYYY  
SSN or HICN  
Or  
Partial MBI (3 characters minimum)  
5 Z 9 x  
Find Reset

The Partial MBI field has 11 spaces, one for each character of the MBI. A minimum of three (3) characters in any of the 11 positions for the MBI must be entered (see example in the sample screen above of “5Z9”, which represents the first, fifth, and last characters of the MBI). This search combined with the first name, last name, and date of birth will return the beneficiary Medicare eligibility characteristics, including the 11 character MBI.

If a beneficiary has either an apostrophe or a hyphen in their last name, the apostrophe, hyphen, or a space must be entered in order to match and return the MBI.

If a beneficiary has a suffix (e.g. Sr., Jr., III, or IV) after their last name and their last name has fewer than six (6) characters, the user must enter the suffix in the three-digit suffix entry box as illustrated above, without any punctuation, in order to match and return the MBI. The suffix is not required if a beneficiary’s last name consists of more than six characters.

CMS is aware that Plans provide MARx access to their downstream entities in accordance with the applicable System of Records Notice<sup>1</sup> and contractual agreements. It is acceptable for a downstream entity to use this access to support beneficiary enrollment in the plan of the beneficiary’s choice, even if that plan is not the one that granted the downstream entity MARx access. Plans are reminded that they are ultimately responsible for the actions of any downstream entity that they provide MARx access, including when that access is being used to

<sup>1</sup> <https://www.hhs.gov/foia/privacy/sorns/09700588/index.html>

support beneficiary enrollment into a different plan. We encourage Plans to incorporate training and oversight to ensure the appropriate use of the MARx system.

Plans are encouraged to contact the MAPD Help Desk for any issues encountered during the systems update process. Please direct any questions or concerns to the MAPD Help Desk at 1-800-927-8069 or e-mail at [mapdhelp@cms.hhs.gov](mailto:mapdhelp@cms.hhs.gov).