

Updated Forms

CMS-40B & CMS-L564

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January 6, 2015
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CMS-40B – Application for Enrollment in Medicare Part B

- **Who can use this form?**

- Beneficiaries who already have Medicare Part A, but not Part B should use this form when signing up for Part B

- **When should this form be used?**

- This form should be used by all Puerto Rico beneficiaries in their IEP
- If the beneficiary is in their Initial Enrollment Period (IEP) and refused Part B or did not sign up for it, but now want Part B
- It can be used to sign up for Part B during the General Enrollment Period (GEP) or a Special Enrollment Period (SEP) if requirements are met.

CMS-L564 – Request for Employment Information

- **Who can use this form?**

- Form CMS-L564 is used by a beneficiary who is seeking a special enrollment period to enroll in Part B or premium Part A.

- **When should this form be used?**

- If a beneficiary did not enroll in Medicare when they were first eligible because they had health coverage through their employer.
- This form must be used when applying for Part B or premium Part A during a SEP.

What's new about the CMS-40B & CMS-L564

- **What's new on the updated forms?**
 - More user-friendly
 - Available online in fillable PDF format for beneficiaries to access directly
 - Available in both English and Spanish
 - Includes step-by-step instructions to help beneficiaries complete them.

Where to find the CMS-40B & CMS-L564 Online

- Both forms are now located on [Medicare.gov](https://www.Medicare.gov). Click on the tab “Forms, Help, & Resources” and selecting “Medicare Forms”

The screenshot shows the Medicare.gov website interface. At the top, there's a navigation bar with links like 'About Us', 'FAQ', 'Glossary', 'CMS.gov', and 'MyMedicare.gov Login'. Below this is a search bar with the placeholder text 'type search term here' and a 'Search' button. The main navigation menu includes 'Sign Up / Change Plans', 'Your Medicare Costs', 'What Medicare Covers', 'Drug Coverage (Part D)', 'Supplements & Other Insurance', 'Claims & Appeals', 'Manage Your Health', and 'Forms, Help, & Resources'. The 'Forms, Help, & Resources' tab is selected, leading to the 'Medicare forms' page. On the left, there's a sidebar with links like 'Find health & drug plans', 'Find doctors, hospitals, & facilities', 'Get help paying costs', 'Find suppliers of medical equipment & supplies', 'Medicare forms' (highlighted), 'Publications', 'Medicare & You', 'Mail about Medicare', 'Lost/incorrect Medicare card', and 'Report fraud & abuse'. The main content area is titled 'Medicare forms' and includes a sub-header 'To get the Medicare form you need, find the situation that applies to you.' Below this, there are three sections: 'Enrollment forms' with links for applying for Part B, signing up for Part B, and 'Appeals forms' with links for appointing a representative and transferring appeal rights. On the right, there's a 'Related Resources' section with links to 'Apply for Medicare online', 'File a claim', 'File a complaint', and 'What to know when filing an appeal'. At the bottom right, there's a 'Find someone to talk to' section with a dropdown menu for 'Select your state...' and a 'Go' button. The footer of the page includes links for 'Cache', 'Tools', 'Validate', and browser/document mode information.

Medicare.gov
The Official U.S. Government Site for Medicare

Sign Up / Change Plans | Your Medicare Costs | What Medicare Covers | Drug Coverage (Part D) | Supplements & Other Insurance | Claims & Appeals | Manage Your Health | Forms, Help, & Resources

Home → Forms, Help, & Resources → Medicare forms

Medicare forms

To get the Medicare form you need, find the situation that applies to you.

- I want to make sure Medicare can give my personal health information to someone other than me (Authorization to Disclose Personal Health Information form).
- I want to file a claim for services and/or supplies that I got.
- I want to start, stop, or change bank accounts for automatic monthly deductions of my Medicare premium.

Enrollment forms

- I have Part A and want to apply for Part B.
- I want to sign up for Part B while I'm employed or during the 8 months after employment or my employer/union coverage has ended, and I need to provide employment information.

Appeals forms

- I want to appoint a representative to help me file an appeal.
- I want to transfer my appeal rights to my provider or supplier.

Related Resources

- Apply for Medicare online
- File a claim
- File a complaint
- What to know when filing an appeal

Find someone to talk to

Select your state... [Dropdown]

Go

es Cache Tools Validate | Browser Mode: IE9 Document Mode: IE9 standards

Completing & Mailing the Forms

- Advise beneficiaries to follow the step-by-step instructions included with both forms.
- The forms can be filled out on the computer or can be printed and then completed by hand.
- Forms cannot be submitted online, rather they must be mailed or taken to the beneficiary's local SSA field office.
- If a beneficiary does not have internet access, they can still visit or call their local SSA office to obtain a copy of either form.