

Possible Qs and As referring to the updated Form CMS-40B and Form CMS-L564

Note: This document is a compilation of Frequently Asked Questions (FAQs) that may be used to answer inquiries and provide information to the public and press.

Q1. What is the Form CMS-40B?

A. Form CMS-40B (Application for Enrollment in Medicare Part B (Medical Insurance)) is an application for Medicare Part B for beneficiaries who already have premium-free Part A.

Q2. What is the Form CMS-L564?

A. The law provides for a special enrollment period (SEP) for beneficiaries who do not enroll in Medicare when they are first eligible because they have health coverage through their employer. Form CMS-L564 (Request for Employment Information) is used by beneficiaries who want to enroll in Part B or premium Part A during this SEP. The form requests information about group health plan (GHP) coverage and active employment information so that the Social Security Administration (SSA) can determine eligibility for enrollment during an SEP.

Q3. Where are these forms available?

A. Form CMS-40B and Form CMS-L564 are available on our [website \(Medicare.gov/forms-help-and-resources/forms/medicare-forms.html\)](https://www.medicare.gov/forms-help-and-resources/forms/medicare-forms.html) by clicking on the tab “Forms, Help & Resources” and selecting “Get Medicare Forms.” This tab is located on the top of the screen at the far right.

Q4. Why are these forms available online and in Spanish now?

A. Making these forms available online is a step the Centers for Medicare & Medicaid Services (CMS) is taking to help beneficiaries access forms in real time and in Spanish, if that is their preference. It eliminates the need for beneficiaries to contact or visit their local social security office to obtain the forms by mail or in person. The updated forms are more user-friendly and provide step-by-step instructions to assist beneficiaries in completing them.

Additionally, these changes are especially helpful to beneficiaries living in Puerto Rico who previously did not have access to the forms in Spanish. Furthermore, beneficiaries who SSA automatically enrolls in Medicare Part A may now obtain and complete the Part B enrollment form prior to or in place of visiting their local social security office.

Q5. Are the forms available in any other language besides English and Spanish?

A. Currently, the forms are only available in English and Spanish.

Q6. What if a beneficiary doesn't have internet access?

A. Beneficiaries can still visit their local social security office or call 1-800-722-1213 (TTY: 1-800-325-0778) to obtain a copy of either form or get help in enrolling in Medicare.

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Q7. Who can use the Form CMS-40B and Form CMS-L564?

A. Any individual who has Medicare premium-free Part A, but not Part B, can use Form CMS-40B to apply for Medicare Part B.

Form CMS-L564 is required when a beneficiary is seeking a special enrollment period to enroll in Medicare Part B or premium Part A. This form is completed by both the beneficiary and their employer or group health plan.

Q8. When would someone need to use the Form CMS-40B?

A. Form CMS-40B is used if a beneficiary:

- is living in Puerto Rico and wants to enroll in Part B during their initial enrollment period (IEP).
- refused Part B or didn't sign up when they applied for Medicare, but now want Part B and are still in their IEP.
- wants to sign up during the general enrollment period (GEP) from January 1 – March 31 each year.
- refused Part B during their IEP because they had group health plan coverage through their own or their spouse's current employment (must also complete Form CMS-L564).
- has Medicare due to disability and refused Part B during their IEP because they had large group health plan coverage through their own, their spouse or family member's current employment (must also complete Form CMS-L564).

Q9. When would someone need to use the Form CMS-L564?

A. Once a beneficiary's initial enrollment period ends, they may have the chance to sign up for Medicare during a special enrollment period (SEP). If the beneficiary didn't sign up for Part B and/or premium Part A when first eligible because they were covered under a group health plan based on current employment (their own, a spouse's, or if disabled, a family member's) they can sign up:

- anytime they're still covered by the group health plan; or
- during the 8-month period that begins the month after the employment ends or coverage ends, whichever happens first.

A beneficiary must use Form CMS-L564 when applying for Medicare Part B or premium Part A during this SEP. Form CMS-L564 is used for evidence of employment and group health plan coverage.

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Q10. What information is needed to fill out these forms?

A. The beneficiary filling out Form CMS-40B will need their Social Security Claim Number (the number on their Medicare card), and their current address and phone number. If they are signing up during a special enrollment period, they also need a completed Form CMS-L564.

When completing Form CMS-L564, the employer's name and address is needed as well as the applicant's Social Security Number and the employee's Social Security Number. The employer fills in the information regarding the group health plan coverage and dates of active employment in the second section of the form.

Q11. How does someone submit these forms?

A. The completed form(s) may be mailed or taken to the beneficiary's local social security office.

Q12. Can the completed forms be submitted to SSA online?

A. No, the forms cannot be submitted to SSA online at this time. They must be submitted to the beneficiary's local social security office in person or by mail.

Q13. Does the beneficiary have to get the forms online?

A. No, the forms are available online for beneficiaries' convenience. Beneficiaries can still visit their local social security office or call 1-800-722-1213 (TTY: 1-800-325-0778) to obtain a copy of either form or get help in enrolling in Medicare.

Q14. People who live in the United States and other U.S. territories are automatically enrolled in both Medicare Part A and Part B if they are receiving social security benefits at least four months before they are eligible for Medicare. Why aren't people living in Puerto Rico automatically enrolled in Medicare Part B?

A. The law does not permit automatic enrollment in Part B for beneficiaries residing in Puerto Rico. If a beneficiary wants Part B, they need to sign up for it.

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