



May 26, 2020

## NEW! Enrolling in Medicare Online for Individuals Previously Covered Under an Employer Group Health Plan

The Social Security Administration (SSA) has a new online service option that beneficiaries can utilize to complete the forms CMS-40B, Application for Enrollment in Medicare - Part B (Medical Insurance) and CMS-L564, Request for Employment Information applications for enrollment in Medicare Part B.

The online process will expedite the handling of those beneficiaries requesting enrollment in Medicare Part B under the Special Enrollment Period (SEP) provisions.

Effective Tuesday, May 26, 2020, based on the collaborative efforts between the Centers for Medicare & Medicaid Services (CMS) and SSA, the new online process for handling Medicare Part B SEP enrollment will be available online. The online process provides beneficiaries the option to complete the Medicare enrollment forms under an SEP for SSA to process. The online Medicare Part B SEP enrollment link <https://secure.ssa.gov/mpboa/medicare-part-b-online-application/> will be available on both [SSA \[ssa.gov\]](https://www.ssa.gov) and [CMS \[cms.gov\]](https://www.cms.gov) websites effective Tuesday, May 26, 2020. Once the beneficiary completes the online enrollment forms, the forms will automatically be transmitted to the SSA Field Office of jurisdiction.

### Eligibility Overview

As a requirement, regardless of the service channel, in order to enroll for Medicare Part B during an SEP, the following are required:

- The individual must be covered under a group health plan (GHP) based on his or her own or a spouse's current employment status, or covered under a large group health plan (LGHP), and the coverage must be based on his or her own, or a family member's current employment status.
- The individual can enroll:

- during any month (including a partial month) in which they are enrolled in a GHP or an LGHP based on current employment status, or
  - in any of the 8 consecutive months following the last month, during any part of which, the individual was enrolled in the GHP based on current employment status,
  - or beneficiaries are eligible for equitable relief if:
    - o The beneficiary had an SEP during the period from March 17, 2020, through June 17, 2020; and
    - o The beneficiary did not apply for Part B during that SEP.
    - o Eligible beneficiaries who wish to take advantage of the equitable relief must file their enrollment request by June 17, 2020.
- The beneficiary must complete the CMS-40B enrollment form, paper or online to request enrollment. In addition, he or she must complete the CMS-L564 form, paper or online.
- The Form CMS-L564 has two sections:
- Section A - the applicant completes Section A.
  - Section B - the employer, the GHP or LGHP completes Section B of the form. The information in Section B provides evidence of GHP or LGHP coverage and dates of employment.

**NOTE:** If the employer cannot sign the CMS-L564, the beneficiary can provide other evidence of previous employment or coverage of GHP or LGHP, or other documents for evidence of employment. Refer to [HI 00805.295 \[secure.ssa.gov\]](#)  
 – Evidence of GHP or LGHP Coverage Based on Current Employment Status.

## Online Enrollment Guidelines

- The online enrollment process will require beneficiaries to complete the CMS-40B, CMS-L564 (one combined online application), and submit any required evidence during one online session.

**NOTE:** The online enrollment process does not offer beneficiaries the option to save and revisit the application.

- Failure to complete and submit the correct documentation may result in a delay in processing the Medicare enrollment.

- During the COVID-19 pandemic, CMS waived the wet signature requirement; however, the online option will require beneficiaries to provide an eSignature (digital signature) and a valid email address.