

Admission Questions to Ask Medicare Beneficiaries

The following outline of questions provides points of data to gather from Medicare beneficiaries that are helpful for providers to determine who has primary payment responsibility for a claim or set of claims by asking the questions upon each inpatient and outpatient admission. The information assists in the proper coordination of benefits to ensure adherence to Medicare Secondary Payer (MSP) provisions as outlined in section 1862(b) of the Social Security Act.

PART I. INFORMATION ABOUT BLACK LUNG, WORKERS' COMPENSATION (WC), NO-FAULT AND LIABILITY

1. Are you receiving benefits under the Black Lung Benefits Act (BL)?

☐ Yes; Date Black Lung Benefits began: ____/____/____

NOTE: BL IS THE PRIMARY PAYER FOR CLAIMS RELATED TO BL.

☐ No.

2. Was the illness/injury due to a work-related accident/condition?

☐ Yes; The following WC information is required to submit claims appropriately:

Name and address of employer:

Name and address of insurance carrier:

Policy or claim number: _____

Date of the workplace illness or the injury: ____/____/____

NOTE: WC IS THE PRIMARY PAYER ONLY FOR SERVICES RELATED TO WORK-RELATED INJURIES OR ILLNESS.

☐ No.

3. Are you receiving treatment for an injury or illness covered under no-fault (and/or medical-payment coverage) including premises or automobile?

☐ Yes; The following no-fault/auto insurance information is required to submit claims appropriately:

Name and address of insurance carrier:

Policy or claim number: _____

Date of illness or injury: ____/____/____

NOTE: NO-FAULT INSURANCE IS THE PRIMARY PAYER ONLY FOR SERVICES RELATED TO THE ACCIDENT.

☐ No.

4. Are you receiving treatment for an injury, or illness, which another party may be liable?

☐ Yes; The following liability information is required to submit claims appropriately:

Name and address of insurance carrier:

Policy or claim number: _____

Date of illness or injury: ____/____/____

NOTE: LIABILITY INSURANCE IS THE PRIMARY PAYER ONLY FOR SERVICES RELATED TO THE LIABILITY SETTLEMENT, JUDGMENT, OR AWARD.

☐ No.

PART II. INFORMATION ABOUT MEDICARE ENTITLEMENT AND GROUP HEALTH PLANS

1. Are you entitled to Medicare based on Age, Disability or ESRD?

- ☐ Age.
- ☐ Disability.
- ☐ End-Stage Renal Disease (ESRD).

NOTE: IF ENTITLEMENT IS BASED SOLELY ON ESRD, SKIP PART II AND COMPLETE PART III. STOP AFTER COMPLETING PART II IF YOU ARE ENTITLED TO MEDICARE BASED ON AGE OR DISABILITY.

2. Do you have group health plan (GHP) coverage based on your own current employment, or the current employment of either your spouse or another family member?

- ☐ Yes. **THE EMPLOYER GHP MAY BE PRIMARY TO MEDICARE. CONTINUE BELOW.**
- ☐ No. **STOP HERE AS MEDICARE IS PRIMARY.**

3. How many employees, including yourself or spouse, work for the employer from whom you have GHP coverage?

- ☐ 1 – 19
- ☐ 20 – 99
- ☐ 100 or more

NOTE: IF YOU ARE AGED AND THERE ARE 20 OR MORE EMPLOYEES, YOUR GHP IS PRIMARY. IF YOU ARE DISABLED AND YOUR EMPLOYER, SPOUSE, OR FAMILY MEMBER EMPLOYER, HAS 100 OR MORE EMPLOYEES, YOUR GHP IS PRIMARY.

The following employer GHP information is required to submit claims appropriately:

Name and address of the employer (your own or your spouse's/family member's) through which you receive GHP coverage

Name and address of GHP

Policy number (sometimes referred to as the health insurance benefit package number): _____

Group number: _____

Date the GHP coverage began: ____/____/____

Name of policyholder (if coverage is through your spouse/other family member): _____

Relationship to patient (if other than self): _____

PART III. INFORMATION ABOUT THE PATIENT IF ESRD MEDICARE ENTITLEMENT APPLIES (INCLUDING DUAL ENTITLEMENT: AGE AND ESRD OR DISABILITY AND ESRD)

1. Do you have employer group health plan (GHP) coverage through yourself, a spouse, or family member if dually entitled based on Disability and ESRD?

- ☐ Yes. **THE EMPLOYER GHP MAY BE PRIMARY TO MEDICARE. CONTINUE BELOW.**
- ☐ No.

2. Have you received a kidney transplant?

- ☐ Yes; Date of transplant: ____/____/____
- ☐ No.

3. Have you received maintenance dialysis treatments?

- ☐ Yes; Date dialysis began: ____/____/____
- ☐ No.

4. Are you within the 30-month coordination period?

- ☐ Yes.
- ☐ No.

NOTE: THE 30-MONTH COORDINATION PERIOD STARTS THE FIRST DAY OF THE MONTH AN INDIVIDUAL IS ELIGIBLE FOR MEDICARE (EVEN IF NOT YET ENROLLED IN MEDICARE) BECAUSE OF KIDNEY FAILURE (USUALLY THE FOURTH MONTH OF DIALYSIS) REGARDLESS OF ENTITLEMENT DUE TO AGE OR DISABILITY. IF THE INDIVIDUAL IS PARTICIPATING IN A SELF-DIALYSIS TRAINING PROGRAM, OR HAS A KIDNEY TRANSPLANT DURING THE 3-MONTH WAITING PERIOD, THE 30-MONTH COORDINATION PERIOD STARTS WITH THE FIRST DAY OF THE MONTH OF DIALYSIS OR KIDNEY TRANSPLANT.

5. Were you receiving GHP coverage prior to and on the date of Medicare entitlement due to ESRD (or simultaneous entitlement due to ESRD and Age or ESRD and Disability)?

☐ Yes. **NOTE: THE GHP IS PRIMARY DURING THE 30-MONTH COORDINATION PERIOD.**

The following information is required to submit claims appropriately:

Name and address of the employer (your own or your spouse's/family member's) through which you receive GHP coverage

Name and address of GHP

Policy number (sometimes referred to as the health insurance benefit package number): _____

Group number: _____

Name of policyholder (if coverage is through your spouse/other family member): _____

Relationship to patient (if other than self): _____

☐ No.

**Source: Internet Only Manual (IOM) *Medicare Secondary Payer Manual*,
Publication 100-05, Chapter 3, Section 20.2.1**