

Medicare Retirement Date Policy

Retirement Date Entry:

- ***When a beneficiary cannot recall*** his/her retirement date but knows it occurred prior to his/her Medicare entitlement dates, as shown on his/her Medicare card, report his/her Medicare A entitlement date as the date of retirement.
- ***If the beneficiary is a dependent under his/her spouse's group health*** insurance and the spouse retired prior to the beneficiary's Medicare Part A entitlement date, report the beneficiary's Medicare entitlement date as his/her retirement date.
- ***If the beneficiary worked beyond his/her Medicare A entitlement date***, had coverage under a group health plan during that time, and cannot recall his/her precise date of retirement but you determine it has been at least 5 years since the beneficiary retired, enter the retirement date as 5 years retrospective to the date of admission (if the date of admission is January 4, 2002, report the retirement date as January 4, 1997, in the format you are currently using).
- As applicable, the ***same procedure holds for a spouse who had retired*** at least 5 years prior to the date of the beneficiary's hospital admission.
- If a beneficiary's (or spouse's, as applicable) ***retirement date occurred less than 5 years*** ago, you must obtain the retirement date from appropriate informational sources; e.g., former employer or supplemental insurer."