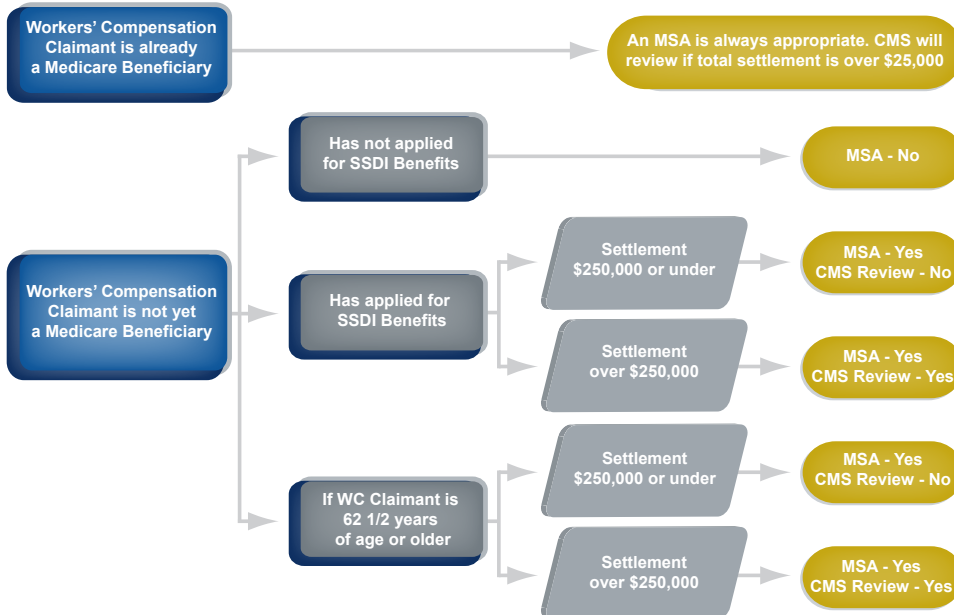


# Medicare Set-Asides

## When are they needed? When will CMS Review the MSA?



If you need an MSA,  
contact us at  
**888.MSA.PMSI**  
or visit us online at  
[www.pmsionline.com](http://www.pmsionline.com)

## MSA File Requirements

### Identification of Claims that Require a Medicare Set-Aside

The first step in the Medicare Set-Aside process is determining an injured individual's Social Security and Medicare Benefit Status. An MSA is needed if the injured individual is a Medicare beneficiary or there is "reasonable expectation" of Medicare entitlement within the next 30 months.

The April 22, 2003 CMS Memorandum indicates "reasonable expectation" includes, but is not limited to the following:

- The individual has applied for Social Security Disability Benefits
- The individual has been denied Social Security Disability Benefits, but anticipates appealing the decision.
- The individual is in the process of appealing and/or re-filing for Social Security Disability Benefits.
- The individual is 62 ½ years or older (i.e., may be eligible for Medicare based on their age within 30 months)
- The individual suffers from End Stage Renal Disease (ESRD)

If the Social Security/Medicare Benefit Status cannot be confirmed by contact with the injured worker, PMSI can assist with this determination prior to proceeding with the MSA.

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