

# Medicare Beneficiary and MSA Status

*Simulated training document only — not an official or live claim file.*

## Medicare Beneficiary Status

<b>Employee Age</b>	37 years old (DOB 11/04/1987).
<b>Current Medicare Status</b>	Not a Medicare beneficiary.
<b>SSDI / ESRD Indicators</b>	No SSDI application or award reported; no ESRD or other basis for early Medicare entitlement noted in the file.

## Reasonable Expectation of Medicare Eligibility

<b>30-Month Lookahead</b>	No evidence that Ms. Moore is reasonably expected to become Medicare-eligible within 30 months of any anticipated settlement. She is under 65 years old, not on SSDI, and does not appear to be in the SSDI application pipeline.
---------------------------	---

## MSA Consideration

<b>Issue</b>	<b>Assessment</b>
Need for WC Medicare Set-Aside (MSA)	Based on claimant age, non-Medicare status, and lack of reasonable expectation of Medicare entitlement, a WCMSA is <b>not indicated</b> for this training scenario. Future medical is modest and consists of conservative care for lumbar spine and left knee.
CMS Reporting / Submission	Internal systems classify this claim as “Not Medicare Eligible; MIR not reportable.” No MSA submission to CMS is planned or required under current internal guidelines.

This document reflects a training analysis of Medicare/Medicare Set-Aside (MSA) status. Real-world files must follow current CMS guidance, Medicare Secondary Payer rules, and carrier/TPA protocols when determining whether an MSA is appropriate.