



SAMPLE

**MEDICARE PART B PREMIUM REIMBURSEMENT
 QUARTERLY PAYMENT REQUEST
 For the CALENDAR Quarter Ending **09 / 30 / 2024****

FC 1646 (11-08-23)
 Side 1 of 2

Retiree Information (Please print clearly)

Retiree Name: **John Smith**

Retiree's Eligible Spouse/Dependent Name: **Spouse Smith**

Address 1: **123 Abc Road** Check here for change of address.

Address 2:

City/State/Zip: **San Jose, CA 95118**

Phone No.: **(408) 123-4567** Email: **xxxxxxx@xxxx.com**

Please indicate if you pay your Part B premium directly to Medicare Premium Collection Center or if the monthly amount is deducted from your Social Security Check? Check one and attach copy of form CMS-500 or copy of Social Security letter.

Pay Directly to MPCC* **(Attach Premium Bill)** Deducted From Social Security Check **(Attach Social Security letter)**

* If you pay directly to Medicare Premium Collection Center and received a NOTICE OF MEDICARE PREMIUM PAYMENT DUE form CMS-500 send notice to the Accounting Unit with this Form.

| Requested Reimbursement | | | | |
|---|-----------------|-----------------|-----------------|-----------------------------|
| Requester | First Month | Second Month | Third Month | Total Reimbursement Request |
| | Jul 2024 | Aug 2024 | Sep 2024 | |
| Retiree | \$174.70 | \$174.70 | \$174.70 | \$524.10 |
| Retiree's Eligible Spouse/Dependent | \$244.60 | \$244.60 | \$244.60 | \$733.80 |
| Total Reimbursement for Medicare Part B Premiums | | | | \$1,257.90 |

Retirees and Eligible Dependent are required to submit to the Benefits Unit a copy of their Medicare Award Notice in order to qualify for reimbursement for Medicare Part B Premium. The yearly Notice of Annual Change in Amount should be sent to the Accounting Unit.

Reimbursable amounts will be paid once a quarter. All requests for payment must be received by the last day of each calendar quarter (March 31, June 30, September 30, and December 31) and payment will be made within 45 days after the end of the quarter. Reimbursement forms not received by the due date will be processed in the subsequent quarter. Reimbursement forms can be obtained by calling the Accounting Unit at (408) 630-2872, or at: www.valleywater.org. (See side 2 for details.)

Return the completed and signed form to: Santa Clara Valley Water District
 General Accounting Unit
 5750 Almaden Expressway
 San Jose, CA 95118

Signature

I hereby certify that the above information is true and correctly stated.

Sign here: **John Smith** Date: **2/21/2024**

Accounting Use Only

| | |
|-----------------------|--------------|
| Vendor No.: | Amount: |
| Charge Acct.: 11-2553 | Invoice No.: |
| Authorized by: | Date: |



MEDICARE PART B PREMIUM REIMBURSEMENT INSTRUCTIONS

FC 1646 (11-08-23)
Side 2 of 2

1. Obtain a copy of form FC 1646 Medicare Part B Reimbursement Quarterly Payment Request. Reimbursement forms can be obtained by going to the District website at <http://www.valleywater.org>. Click on Copyright©Santa Clara Valley Water District at the bottom left corner of the website page or type <https://www.valleywater.org/valley-water-retirees-information> in the Address box. Click on "Click here to access retiree information." The password to enter the restricted area is "retiree." Type "retiree" in the box under Enter Password to authorize use of this page. At the Retiree Menu Welcome page click on Medicare Part B Reimbursement form. The form will automatically open as an Adobe PDF file. Save the file to your computer for future submissions. Complete form as instructed below. If in the process you have any questions please call the Accounting Unit at (408) 630-2872, for assistance.
2. On the right top corner next to "For the CALENDAR Quarter Ending," enter the calendar quarter ending date that you are requesting for reimbursement, such as, 3/31/XX, 6/30/XX, 9/30/XX, or 12/31/XX. Please complete one form per Calendar Quarter. Please note that if you make quarterly payments for your Medicare Part B premiums, the District's quarterly reimbursement schedule may differ from your quarterly Medicare payment schedule. The actual reimbursements you receive from the District may be split between quarters.
3. Under Retiree Information please print clearly the Retiree's Name, Address, City/State/Zip, and Phone No. The reimbursement check is made out to Retiree unless Retiree is deceased. If the Retiree is deceased, please write "Deceased" next to Retiree name.
4. If there was a change of address from the prior reimbursement request please check the box next to "Check here for change of address" to alert the District to update your address in our system.
5. Under Current Medicare Insurance Part B Reimbursement please complete the following for you and/or eligible dependents.
 - a. First month refers to the first month of the quarter you are requesting reimbursement, such as January, April, July, or October.
 - b. Second Month refers to the second month of the quarter you are requesting reimbursement, such as February, May, August, or November.
 - c. Third Month refers to the third month of the quarter you are requesting reimbursement, such as March, June, September, or December.
6. Under the Column Total Reimbursement Request enter the total amount requesting reimbursement for the Retiree and for the eligible dependents then add both totals to get the Total Reimbursement for Medicare Part B Premiums.
7. Under the Signature area the Retiree must sign and date the form to certify that the information is true and correctly stated.
8. Please attach proof of payment or deduction. If you send payments to Medicare Premium Collection Center, please attach a copy of your "NOTICE OF MEDICARE PREMIUM PAYMENT DUE" form CMS-500 or copy of Social Security letter.
9. Send completed signed form and attachments to:

Santa Clara Valley Water District
General Accounting Unit
5750 Almaden Expressway
San Jose, CA 95118