

The Cross Section of Medicare, Group Plans, and HSAs

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| I. | Introduction/Background | 5 minutes |
| II. | Medicare Secondary Payer Rules | 15 minutes |
| | a. Groups < 20 | |
| | b. Groups >= 20 | |
| | c. Disability | |
| | d. Retiree Plans | |
| | e. COBRA and the COBRA Trap | |
| III. | Enrollment and Auto-enrollment in Medicare | 10 minutes |
| | a. Enrolled in Social Security before 65 | |
| | b. Not Enrolled in Social Security before 65 | |
| | c. Enrolling after age 65 | |
| IV. | HSAs and Medicare | 20 minutes |
| | a. What is HAS | |
| | b. HSA Legislation/History | |
| | c. HSA Eligibility and Max Contributions | |
| | d. HSA Fund Usage | |
| | e. HSA Examples with Medicare | |
| V. | Summary and Additional Q&A | 10 minutes |