

## Medicare Current Beneficiary Survey PUF Glossary

Term Name	Definition
Baseline interview	The initial questionnaire administered to new respondents to the study; administered in the fall round of the year they are selected into the sample (interview #1).
Beneficiary	Beneficiary refers to a person receiving Medicare services who may or not be participating in the MCBS. Beneficiary may also refer to an individual selected from the MCBS sample about whom the MCBS collects information.
Community component	Survey administered for beneficiaries living in the community (i.e., not in a long-term care facility such as a nursing home) during the reference period covered by the MCBS interview. An interview may be conducted with the beneficiary or a proxy.
Continuing interview	The questionnaire administered to repeat respondents as they progress through the study (interviews #2-12).
Continuously enrolled (aka always enrolled)	A Medicare beneficiary who was enrolled in Medicare from the first day of the calendar year until the fall interview and did not die prior to the fall round. This population excludes beneficiaries who enrolled during the calendar year 2020, those who dis-enrolled or died prior to their fall interview, residents of foreign countries, and residents of U.S. possessions and territories other than Puerto Rico.
Core sections	These sections of the MCBS Questionnaire are of critical purpose and policy relevancy to the MCBS. They may be fielded every round or on a seasonal basis.
Crossover	A beneficiary who enters a long-term care facility setting (e.g., nursing homes) or who alternates between a community and a facility setting.
Ever enrolled	A Medicare beneficiary who was enrolled at any time during the calendar year including people who dis-enrolled or died prior to their fall interview. Excluded from this population are residents of foreign countries and of U.S. possessions and territories other than Puerto Rico.
Facility component	Survey administered for beneficiaries living in facilities, such as long-term care nursing homes or other institutions, during the reference period covered by the MCBS interview. Interviewers conduct the Facility component with staff members located at the facility (i.e., facility respondents); beneficiaries are not interviewed if they reside at a facility.
Incoming Panel sample (formerly known as Supplemental Panel)	A statistically sampled group of beneficiaries that enter the MCBS in the fall round of a data collection year. One panel is retired at the conclusion of each winter round, and a new panel is selected to replace it each fall round. Panels are identified by the data collection year (e.g., 2020 Panel) in which they were selected.
Long-term care facility	A facility that provides rehabilitative, restorative, and/or ongoing skilled nursing care to patients or residents in need of assistance with activities of daily living.
Medicare	<p>Medicare is the federal health insurance program for people who are 65 or over, certain younger people with disabilities, and people with End-Stage Renal Disease (permanent kidney failure requiring dialysis or a transplant, sometimes called ESRD). The different parts of Medicare help cover specific services:</p> <ol style="list-style-type: none"> <li>1. Hospital Insurance (Part A): covers inpatient hospital stays, care in a skilled nursing facility, hospice care, and some home health care.</li> <li>2. Medical Insurance (Part B): covers certain doctors' services, outpatient care, medical supplies, and preventive services.</li> <li>3. Medicare Advantage (Part C): an alternative to coverage under traditional Medicare (Parts A and B), a health plan option similar to a Health Maintenance Organization (HMO) or Preferred Provider Organization (PPO) administered by private companies.</li> <li>4. Prescription Drug Coverage (Part D): additional, optional coverage for prescription drugs administered by private companies.</li> </ol>
Medicare Advantage (MA)	Medicare Advantage Plans, sometimes called "Part C" or "MA Plans," are offered by private companies approved by Medicare. An MA provides, or arranges for the provision of, a comprehensive package of health care services to enrolled persons for a fixed capitation payment. The term "Medicare Advantage" includes all types of MAs that contract with Medicare, encompassing risk MAs, cost MAs, and health care prepayment plans (HCPPs).
Medicare beneficiary (aka, beneficiary)	See Beneficiary.
Panel	see Incoming Panel Sample
Primary Sampling Unit (PSU)	Primary sampling unit refers to sampling units that are selected in the first (primary) stage of a multi-stage sample ultimately aimed at selecting individual elements (Medicare beneficiaries in the case of MCBS). PSUs are made up of major geographic areas consisting of metropolitan areas or groups of rural counties.
Race/ethnicity	Hispanic origin and race are two separate and distinct categories. Persons of Hispanic origin may be of any race or combination of races. Hispanic origin includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or Spanish origin. For the MCBS, responses to beneficiary race and ethnicity questions are reported by the respondent. More than one race may be reported. For conciseness, the text, tables, and figures in this document use shorter versions of the terms for race and Hispanic or Latino origin specified in the Office of Management and Budget 1997 Standards for Data on Race and Ethnicity. Beneficiaries reported as white and not of Hispanic origin were coded as white non-Hispanic; beneficiaries reported as black/African-American and not of Hispanic origin were coded as black non-Hispanic; beneficiaries reported as Hispanic, Latino/Latina, or of Spanish origin, regardless of their race, were coded as Hispanic. The "other" race category includes other single races not of Hispanic origin (including American Indian or Alaska Native, Asian, Native Hawaiian or other Pacific Islander), two or more races, or unknown races.
Respondent	Respondent refers to a person who answers questions for the MCBS; this person can be the beneficiary, a proxy, or a staff member located at a facility where the beneficiary resides (i.e., the facility respondent).
Round	The MCBS data collection period. There are three distinct rounds each year, winter (January through April); summer (May through August), and fall (September through December).
Secondary Sampling Unit (SSU)	SSUs are made up of census tracts or groups of tracts within the selected PSUs.

Topical sections	Sections of the MCBS Questionnaire that collect information on special interest topics. They may be fielded every round or on a seasonal basis. Specific topics may include housing characteristics, drug coverage, and knowledge about Medicare.
Ultimate Sampling Unit (USU)	USUs are Medicare beneficiaries selected from within the selected SSUs.