Retiring **AND** Medicare Eligible Benefits

**Enrollment Process**

- If you and/or your spouse are Medicare eligible, you should begin this process **3 months prior** to your retirement.
- Failure to follow the process outlined below could result in a disruption of your medical coverage.
- This process must be followed **PRIOR** to your retirement date to ensure your continued coverage.
- Your unit will initiate your separation electronically upon your retirement; your record will be updated to “retired” status.
- Your medical plan will be updated only **after** we receive your completed Freedom Blue Application.

**Please see the checklist below for the steps to take to apply for Medicare A and B and completing the Highmark Freedom Blue application.**

1. Apply for Medicare Part A and B by visiting your local Social Security Office or via medicare.gov. Questions pertaining to Medicare should be directed to the Social Security Office.

2. If you are 65 years old and four months, the Social Security office requires a Request for Employment Information form, CMS-L564.
   - Call HR Services and request the CMS-L564E, *Request for Employment Information* form be sent to you. **Be sure to advise how the form should be returned to you, either by Intercampus Mail or by US Postal Mail and provide the return address.**
   - Take completed CMS-L564E, *Request for Employment Information* form, to the local Social Security Office to apply for Medicare Parts A and B or apply via medicare.gov. If you already have Part A, you will only need to apply for Part B.

3. If you are enrolled in the LION Advantage with a Health Savings Account, please visit our website for additional information if you are 65+ and/or consult with a licensed tax advisor.

4. Upon receipt of your Medicare Card, complete a Freedom Blue application. You need the information on the Medicare card to complete a Freedom Blue application. Freedom Blue applications are available at hr.psu.edu/benefits/retirement/guide-to-retirement.
   - **Form MUST be received PRIOR to your retirement. As soon as you complete the application please send immediately to Penn State Employee Benefits as follows:**
     - **Via US Mail:** Penn State Employee Benefits
       The 331 Building, Suite 136
       University Park, PA 16802
     - **OR**
       **FAX:** 814-863-6227

Failure to return the Freedom Blue application(s) within 60 days after your retirement will be considered a voluntary dis-enrollment in retiree medical benefits offered. Once dis-enrolled, retirees are not able to re-enroll at a later date.