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. Questions pertaining to Medicare should be directed to the Social Security Office.
2. If you are enrolled in the PPO Savings plan with a Health Savings Account, please visit our website for additional information if you are 65+ and/or consult with a licensed tax advisor.
3. If you are 65 years old and four months, the Social Security office requires a Request for Employment Information form, CMS-L564.
   - Print Request for Employment Information form, CMS-L564, from the Guide to Retirement Reference chart at hr.psu.edu/benefits/retirement/guide-to-retirement or you can obtain one by visiting medicare.gov.
   - Complete Section A – Applicant Name, PSU Employee Name, Social Security Number.
   - Send form to Penn State Employee Benefits for completion of Section B by:
     - Intercampus Mail: Penn State Employee Benefits, The 331 Building, Suite 136
     - US Mail: Penn State Employee Benefits, The 331 Building, Suite 136 University Park, PA 16802
   - Advise how the form should be returned to you, either by Intercampus Mail or by US Postal Mail and provide the return address.
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
     - FAX: 814-865-7145
   - Log an inquiry via the WorkLion portal at worklion.psu.edu.