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. Please contact HR Services at 814-865-1473 or submit an inquiry through Worklion to confirm your eligibility (policy HR 54) to continue medical benefits into retirement.
2. 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.
3. 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.
4. 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.
     - If you already have Part A, you will need to apply for Part B.
     - Your effective date will be the first of the month following your retirement; If you retire on the 1st of any month, then that is your effective date.
5. 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 of 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.

HR Services
814-865-1473