



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.

