

MEDICAL BENEFIT TRANSITION TO RETIREMENT CHECKLIST

**If you are 65+ (and/or if your dependent is 65+), apply for Medicare three months before you retire by contacting SSA at (800) 772-1213 or ONLINE at www.ssa.gov.
Enroll in Medicare Parts A and B
DO NOT enroll in Medicare Part D**

What do I need to complete and return to CalPERS?

- 1) If you are under age 65 at the time of retirement, you do not need to return anything to CalPERS, unless you have a dependent over age 65 at the time of your retirement. If you have a dependent over age 65, you must complete and return the Certification of Medicare Status form along with a copy of your dependent's Medicare Card.
- 2) If you are over age 65 at the time of retirement, you must complete and return the Certification of Medicare Status form along with a copy of your Medicare Card, and your dependent's Medicare card if dependent is 65+.

What do I need to complete and return to FHDA?

- 1) Application for Retiree Health Benefits
- 2) Health Benefits Plan Enrollment for Retirees over age 65 (form HBD30)
- 3) A copy of your CalSTRS and/or CalPERS Award Letter
- 4) A Copy of your Medicare card if over age 65 for both you and/or your dependent
- 5) A copy of Medicare/CMS Award Letter or Proof of Medicare premium Part B payment (*Note: No retroactive reimbursement is provided due to late notice*).

REMEMBER:

- ✓ In order to provide FHDA health benefits to your survivor, you must choose a CalSTRS or CalPERS option so that your survivor is an annuitant.
- ✓ If you take your CalSTRS or CalPERS pension as a lump sum, you forfeit FHDA retiree health benefits.

CalPERS Health Benefits Contact Information:

Online: For more information on health benefits and programs, visit CalPERS at www.calpers.ca.gov.

By Phone: Call CalPERS toll free at 888 CalPERS or (888-225-7377)
Monday through Friday, 8:00 a.m. to 5:00 p.m.