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.