



Retirement Roadmap

90 Days

MEDICARE

Participants aged 65 or older must apply for Medicare 90 calendar days before retirement or during their 65th birthday month. For more details, review the Attaining Medicare Summary.

Social Security will request a CMS L564 form to be completed. Contact 714-834-6282 to have the form completed.

<https://www.ssa.gov>

60 Days

OCERS

Visit the OCERS website and submit an Intent to Retire (ITR) up to 60 days prior to your intended retirement date.

After the OCERS ITR process is complete, the Benefits Service Center will send you an enrollment notice to make your retiree medical elections.

<https://www.ocers.org/>

30 days

ENROLLMENT NOTICE

You will have 30 calendar days to make your retiree medical elections.



You can elect to temporarily opt out of the retiree medical plan during your initial retiree medical enrollment.

mybenefits.ocgov.com

Post Retirement

THINGS TO CONSIDER



Setting up pension deductions for retiree medical takes 2-3 months; watch for Direct Bill invoices.



Complete follow-up items for Temporary Opt Out or Medicare Verification, if applicable.



Missing deadlines leads to automatic enrollment in default retiree medical coverage, with no changes allowed until Open Enrollment.

If you get lost along the way, contact the Benefits Service Center at 1-833-476-2347.





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