

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/

Post Retirement

THINGS TO CONSIDER



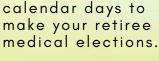
Setting up pension
deductions for retiree
medical takes 2-3 months;
watch for Direct Bill
invoices.



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.



You will have 30

ENROLLMENT

NOTICE

30 days

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

mybenefits.ocgov.com



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



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plan during your

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