

RETIREMENT PREPARATION

- Attend Retiree Webinars & Medicare Webinars: [Retirement planning webinars | UCnet](#)
[Medicare office hours and webinars | UCnet](#)
- Schedule a Meeting with a Retirement Counselor: [My UC Retirement](#)
- Run Retirement Estimates in [UC Retirement At Your Service \(UCRAYS\)](#)
- Pick Your Retirement Date and create your Personal Retirement Profile through UCRAYS
- Submit and Finalize your Retirement Election Through UCRAYS **90 days before retirement date.**

IF YOU ARE OVER 65 AND DEFERRED MEDICARE WHILE WORKING

Step 1 — Request Employer Verification/CMS L564

- Your campus/location completes Section B: [Health care facilitators | UCnet](#)
For UCSF, email benefits@ucsf.edu
- [You Complete Section A](#)

Important: If you receive Social Security payments, you will automatically be enrolled in Medicare Part A & B when you turn 65 unless you opted out. If you are enrolled in Medicare Part A & B, jump to the “Once Medicare is Active” section.

Step 2 — Apply for Medicare

Apply in Person

Schedule an Appointment through your [Local Social Security Administration Office](#)

- Provide [CMS L564](#)
- [CMS 40B](#) if already enrolled in Medicare Part A

Apply Online

- Go to [Sign up for Medicare | Social Security Administration](#)
- Create or log in to [The United States Social Security Administration](#)
- Complete Medicare Part A & B Application
- Complete Medicare Part B enrollment only if already enrolled in Medicare Part A
- Upload completed CMS L564 supporting documents

When you enroll in Medicare, Social Security will ask the following questions regarding Group Health Coverage. Note, when you retire from UC, you are no longer an active employee; and your active Group Health Plan coverage ends upon your separation.

Are you covered under a Group Health Plan? **NO**

Are you covered under a Group Health Plan through your own current employment? **NO**

Are you covered under a Group Health Plan through another person's current employment? **NO, if you are not covered. YES, if you are.**

Apply by Phone

- Call Social Security at 1-800-772-1213 (TTY 1-800-325-0778)
- Have personal information ready (SSN, birth date, employer info, CMS L564 if deferred)
- Complete Medicare Part A & B application with Social Security Administration representative

Step 3 — Follow Up

- Log back into [The United States Social Security Administration](#) after 2–3 weeks
- Check Medicare application status
- Print Benefit Verification Letter at: [Get benefit verification letter | Social Security Administration](#)

ONCE MEDICARE IS ACTIVE

Enroll in Your UC Medicare Plan

Option 1 — Submit a UBEN Form

Locate the forms via [HR forms and publications | UCnet](#)

Additional Information: (Forms must be received within 90 days of the effective date, the arbitration box must be checked, and a signature and date are required)

- UBEN 100 – Change Form
 - UBEN 121 – UC Medicare Choice PPO – Medicare Advantage PPO Plan
 - UBEN 123 – UC Medicare PPO – Supplemental Plan
 - UBEN 123 – UC High Option – Supplemental Plan
- (All parties must be Medicare-eligible and enrolled in the same plan)**
- UBEN 127 – Kaiser Senior Advantage
 - UBEN 100 – UC Medicare PPO Without Rx (Prescription) Coverage – Supplemental
- (Must provide RASC with proof of Rx coverage; all parties must be Medicare-eligible and enrolled in the same plan.)**
- UBEN 100 – Medicare Coordinator Program – For members living outside California
(see [Medicare Coordinator Program site](#) for eligibility requirements)

Option 2 — Enroll via UCRAYS – **(New Retirees must submit a paper UBEN form)**

- [Login - UC Retirement At Your Service](#) → Submit Life Event Change → Medicare Enrollment

MEDICARE PREMIUM INFORMATION

- If you are receiving Social Security benefits, your Medicare premiums are automatically deducted from your Social Security check.
- If you are not yet receiving Social Security benefits, you will receive a quarterly paper bill from Social Security.
 - Select your payment option: [How to Pay Part A & Part B premiums | Medicare](#)

UC PREMIUM INFORMATION

- UC medical, dental and legal premiums are deducted from your monthly retirement check.
- If you are a Savings Choice Retiree, UC premiums will be billed monthly.