



MEDICARE NOTIFICATION PROCESS For Retirees 65 and Over

No.	LETTER	PURPOSE	DISTRIBUTION
1	Initial Medicare Notification (include Medicare Fact Sheet)	Notifies retiree and covered spouse of Medicare entitlement/enrollment obligations; <i>enrollee signs and returns to school</i>	Distribute prior to (preferable) or upon retirement date.
2	Enrollment Reminder Letter	Reminds eligible enrollee to enroll in Medicare before Initial Enrollment Period or Special Enrollment Period expires. <i>However, regardless of CMS' Special Enrollment Period of 8 months, under the NY44 Trust SPD, an enrollee will have six (6) months from the date of first eligibility to obtain the coverage (both Part A and Part B) or they will be terminated from coverage effective six (6) months from the date of first eligibility.</i>	Mail 60 days prior to the end of: <u>Initial Enrollment Period*</u> (7 months long = 3 months prior to 65 th birth month; month of 65th birthday ; 3 months after birth month) <i>*if enrollment occurs in birth month or 3 months after birth month Medicare's start date is delayed</i> Mail 90 days prior to the end of: <u>Special Enrollment Period</u> (8 months following retirement month)
3	Final Notification Letter	If no response is received from Letter #2 and school has not received Medicare enrollment information, send this letter to notify Medicare-eligible enrollee to obtain coverage during the General Open Enrollment period. <i>However, regardless of when CMS' General Enrollment Period falls, under the NY44 Trust SPD, an enrollee will have six (6) months from the date of first eligibility to obtain the coverage (both Part A and Part B) or they will be terminated from coverage effective six (6) months from the date of first eligibility.</i>	Mail 60 days prior to end of Medicare's annual enrollment period: <u>General Enrollment Period</u> (January 1 – March 31) Medicare start date is July 1 st .