RetireeFirst

Simplifying the Age-In Process for Plan Sponsors and Retirees

RetireeFirst understands the complexity of managing Group Medicare enrollments and has the age–in process down to a science.

The Age-In Process

Age-ins refer to individuals who will become Medicare eligible and have the opportunity to transition from active employer- or union-sponsored health coverage to a Medicare-based plan.

Retirees who don't transition into Medicare during their seven-month Initial Enrollment Period may be subject to penalties and delayed access to healthcare.

For Group Medicare plan sponsors, the age-in process is equally critical. Many early retirees remain on the active employee plan, which is often more expensive for the plan sponsor. Transitioning these retirees to a Medicare-based plan not only aligns with regulatory requirements, but also helps reduce costs while continuing quality healthcare coverage.

How We Support the Process

RetireeFirst will integrate seamlessly into our clients' existing systems and processes. We accept eligibility data in any format and gather the necessary information to create a member **Welcome Kit** containing:

- An introduction to RetireeFirst
- A pre–enrollment kit from the insurance carrier
- An enrollment form
- A magnet with a dedicated number for live member support

Members are informed of their plan options, Medicare enrollment deadlines or opt–out timeframes, and any required actions. After Welcome Kits are mailed, our team conducts a **Three–Step Outreach** to ensure no member is left behind:

1 Welcome Call
Informing members that their kit is on the way

2 Follow–Up Call
Conducted after the welcome call if we have not received their enrollment forms

3 Postcard Reminder
Sent after the follow-up call, if needed

Our Comprehensive Solution

Client services and program implementation are just a part of our comprehensive Retiree Benefits Management solution. To learn more, visit **RetireeFirst.com** or contact our advisors at **sales@RetireeFirst.com**.