

IRMAA Re-determination Data Collection Screens

Last Updated: 10/02/2006

Ln	N	0	1	2	3	4	5	6	7	8
0	1		234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890							
	1C		IRMAA							
	20									
	3L									
	4U									
	5M									
	6N		*SELECT THE DESIRED FUNCTION: _							
	7*		1=MAIN MENU							
	80		2=QUERY MENU							
	9N		3=CALCULATOR.							
	10E									
	11*									
	12R									
	13E									
	14S									
	15E									
	16R									
	17V									
	18E									
	19D									
	20									
	21									
	22									
	23									
	24		***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****							

Ln	0	1	2	3	4	5	6	7	8	
o	1	234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	1234567890	
	1C	IRMAA INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MAIN MENU IRMN M07B								
	20	FIELD OFFICE: SSS							*UNIT: _____	
	3L									
	4U	*BENEFICIARY SSN: _____								
	5M									
	6N	*SELECT THE DESIRED OPTION: _ 1=ESTABLISH 2=UPDATE 3=QUERY.								
	7*									
	80	*SELECT THE DESIRED FUNCTION: ____								
	9N	1=LIFE CHANGING EVENT 2=TAX INFORMATION 3=MANUAL IRMAA ADJUSTMENT.								
	10E									
	11*	IF FUNCTION 2 SELECTED (ESTABLISH ONLY) INPUT TAX YEAR (CCYY): _____								
	12R	IF FUNCTION 3 SELECTED (ESTABLISH ONLY) INPUT PREMIUM YEAR (CCYY): _____								
	13E									
	14S	IF APPEAL DETERMINATION, SELECT LEVEL: _								
	15E	1=RECONSIDERATION 2=ALJ 3=APPEALS COUNCIL 4=COURT CASE.								
	16R									
	17V	SELECT APPEAL DISPOSITION: _								
	18E	1=FULLY FAVORABLE REVERSAL 3=DISMISSAL 5=WITHDRAWAL 7=REMAND								
	19D	2=PARTIALLY FAVORABLE REVERSAL 4=AFFIRMATION 6=ABANDON.								
	20	DATE OF APPEAL DETERMINATION (MMDDCCYY): _____								
	21	REMARKS: _____								
	22									
	23									
	24	***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****								

Ln	0	1	2	3	4	5	6	7	8
No	1	234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890							
1C		IRMAA			LIFE CHANGING EVENT				IRLC M07C
20		SSN: SSSSSSSSS		NAME: SSSSSSSSSSSSSSS S	SSSSSSSSSSSSSSSSSSSS			DOB: SSSSSSSS	
3L									
4U									
5M		*SELECT LIFE CHANGING EVENT: _							
6N		1=DEATH OF SPOUSE			5=WORK STOPPED				
7*		2=MARRIAGE/REMARRIAGE			6=PENSION INCOME LOSS				
80		3=DIVORCE			7=INCOME LOSS FROM INCOME PRODUCING PROPERTY				
9N		4=WORK REDUCTION			8=NON-QUALIFYING EVENT.				
10E									
11*									
12R		*DATE OF LIFE CHANGING EVENT (MMCCYY): _____							
13E									
14S									
15E		*SELECT PROOF: _ 1=PROVEN 2=NOT PROVEN 3=PENDING.							
16R									
17V		REMARKS: _____							
18E									
19D									
20		DELETE THIS LIFE CHANGING EVENT OCCURRENCE (Y/N): _							
21		THIS OCCURRENCE WILL BE DELETED - CONTINUE (Y/N): _							
22								ENTER TAX YEAR (CCYY): _____	
23									
24		***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****							

Ln	0	1	2	3	4	5	6	7	8
No	1	234567890123456789012345678901234567890123456789012345678901234567890							
1C		IRMAA			TAX INFORMATION				IRMA M07D
20		SSN: SSSSSSSSS		NAME: SSSSSSSSSSSSSSS S		SSSSSSSSSSSSSSSSSSSS		DOB: SSSSSSSS	
3L		TYPE: SSS		TAX YEAR: SSSS		AGI: SSSSSSSSSSSS-		TAX EXEMPT INTEREST: SSSSSSSSSSSS	
4U									
5M		*BENEFICIARY REPORT DATE (MMDDCCYY): _____					*TAX YEAR (CCYY): _____		
6N		ADJUSTED GROSS INCOME: _____			-		TAX EXEMPT INTEREST: _____		
7*									
80		SELECT SOURCE: _							
9N		1=TAX RETURN				3=ESTIMATED TAX DATA			
10E		2=AMENDED TAX RETURN				4=IRS TAX CORRECTION DATA.			
11*									
12R		*SELECT FILING STATUS: _							
13E		1=SINGLE				4=HEAD OF HOUSEHOLD			
14S		2=MARRIED FILING JOINTLY				5=QUALIFYING WIDOW/WIDOWER			
15E		3=MARRIED FILING SEPARATELY				6=MARRIED FILING SEPARATELY LIVING APART ALL YEAR.			
16R									
17V		*SELECT PROOF: _			1=PROVEN	2=NOT PROVEN	3=PENDING.	GOOD CAUSE (Y/N): _	
18E		REMARKS: _____							
19D									
20		DELETE THIS TAX INFORMATION OCCURRENCE (Y/N): _							
21		THIS OCCURRENCE WILL BE DELETED - CONTINUE (Y/N): _							
22									
23									
24		***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****							

Ln	0	1	2	3	4	5	6	7	8
0	1	234567890123456789012345678901234567890123456789012345678901234567890							
	1C	IRMAA							IRPP M07E
	20	SSN: SSSSSSSSS	NAME: SSSSSSSSSSSSSSS S	SSSSSSSSSSSSSSSSSSSSSS	DOB: SSSSSSSSS				
	3L								
	4U								
	5M	I UNDERSTAND THAT BY SUBMITTING THIS EVIDENCE I AM DECLARING UNDER PENALTY							
	6N	OF PERJURY THAT ALL THE INFORMATION PROVIDED IS TRUE AND CORRECT							
	7*	TO THE BEST OF MY KNOWLEDGE. I UNDERSTAND THAT ANYONE WHO KNOWINGLY GIVES A							
	80	FALSE OR MISLEADING STATEMENT ABOUT A MATERIAL FACT OR CAUSES SOMEONE ELSE TO							
	9N	DO SO, COMMITS A CRIME AND MAY BE SENT TO PRISON, OR MAY FACE OTHER PENALTIES,							
	10E	OR BOTH.							
	11*								
	12R	*APPLICANT ATTESTS THAT ALL INFORMATION PROVIDED IS CORRECT (Y/N): _							
	13E								
	14S								
	15E								
	16R								
	17V								
	18E								
	19D								
	20								
	21								
	22								
	23								
	24	***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****							

Ln	0	1	2	3	4	5	6	7	8
No	1	23456789012345678901234567890123456789012345678901234567890123456789012345678901234567890							
1C		IRMAA MANUAL IRMAA ADJUSTMENT						IRIA M07F	
20		SSN: SSSSSSSSS	NAME: SSSSSSSSSSSSSSS S	SSSSSSSSSSSSSSSSSSSSSS	DOB: SSSSSSS				
3L									
4U									
5M		CURRENT IRMAA DATA							
6N		PREMIUM YEAR: SSSS	TAX YEAR: SSSS	FILING STATUS: SSSSSSSSSSSSSSSSSSSSSSSSS					
7*		AGI: SSSSSSSSSSSSS-	TAX EXEMPTINTEREST: SSSSSSSSSSS	IRMAA AMOUNT: SSSSSSSSSSS					
80									
9N		MANUAL IRMAA INPUT							
10E		*BENEFICIARY REPORT DATE (MMDDCCYY): _____	TAX YEAR (CCYY): _____						
11		ADJUSTED GROSS INCOME: _____	TAX EXEMPT INTEREST: _____						
12R		SELECT FILING STATUS: _							
13E		1=SINGLE	4=HEAD OF HOUSEHOLD						
14S		2=MARRIED FILING JOINTLY	5=QUALIFYING WIDOW/WIDOWER						
15E		3=MARRIED FILING SEPARATELY	6=MARRIED FILING SEPARATELY LIVING APART ALL YEAR.						
16R									
17V		PREMIUM YEAR: SSSS							
18E		SELECT IRMAA AMOUNT: _							
19D		0=NO IRMAA	2=LEVEL TWO (SSSS.SS)	4=LEVEL FOUR (SSSS.SS)					
20		1=LEVEL ONE (SSSS.SS)	3=LEVEL THREE (SSSS.SS).						
21									
22									
23									
24		***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****							

Ln	0	1	2	3	4	5	6	7	8
0	1	23456789012345678901234567890123456789012345678901234567890123456789012345678901234567890							
1	C	IRMAA		PENDING LIFE CHANGING EVENTS				IRLP M07H	
2	0	SSN: SSSSSSSSS		NAME: SSSSSSSSSSSSSSS S SSSSSSSSSSSSSSSSSSSSS				DOB: SSSSSSSS	
3	L								
4	U								
5	M	*SELECT DESIRED EVENT: ___							
6	N								
7	*	01=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
8	0	02=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
9	N	03=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
10	E	04=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
11	*	05=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
12	R	06=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
13	E	07=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
14	S	08=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
15	E	09=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
16	R	10=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
17	V	11=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
18	E	12=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
19	D	13=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
20									
21									
22									
23									
24		***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****							

Ln	0	1	2	3	4	5	6	7	8	
0	1	234567890123456789012345678901234567890123456789012345678901234567890								
1	C	IRMAA	LIFE CHANGING EVENT QUERY HISTORY					IRLQ M07I		
2	0	SSN: SSSSSSSSS	NAME: SSSSSSSSSSSSSSS S SSSSSSSSSSSSSSSSSSSSS				DOB: SSSSSSSS			
3	L									
4	U									
5	M	*SELECT DESIRED EVENT: ___								
6	N									
7	*	01=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
8	0	02=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
9	N	03=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
10	E	04=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
11	*	05=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
12	R	06=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
13	E	07=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
14	S	08=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
15	E	09=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
16	R	10=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
17	V	11=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
18	E	12=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
19	D	13=PROCESS: _____	STATUS: -	EVENT: _____	DATE: _____	APPEAL: _____				
20										
21										
22										
23										
24		***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****								

Ln	0	1	2	3	4	5	6	7	8	
o	1	234567890123456789012345678901234567890123456789012345678901234567890								
	1C	IRMAA	PENDING TAX INFORMATION					IRTP M07J		
	20	SSN: SSSSSSSSS	NAME: SSSSSSSSSSSSSSS S SSSSSSSSSSSSSSSSSSSSS					DOB: SSSSSSSS		
	3L									
	4U									
	5M	*SELECT DESIRED EVENT: ___								
	6N									
	7*	01=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	80	02=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	9N	03=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	10E	04=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	11*	05=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	12R	06=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	13E	07=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	14S	08=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	15E	09=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	16R	10=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	17V	11=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	18E	12=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	19D	13=REPORT DATE: _____	TAX YEAR: _____	SOURCE: _____	APPEAL: _____					
	20									
	21									
	22									
	23									
	24	***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****								

Ln	0	1	2	3	4	5	6	7	8	
o	1	234567890123456789012345678901234567890123456789012345678901234567890								
	1C	IRMAA	TAX INFORMATION QUERY HISTORY					IRTQ M07K		
	20	SSN: SSSSSSSSS	NAME: SSSSSSSSSSSSSSS S SSSSSSSSSSSSSSSSSSSSSSS					DOB: SSSSSSSS		
	3L									
	4U									
	5M	*SELECT DESIRED EVENT: ___								
	6N									
	7*	01=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	80	02=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	9N	03=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	10E	04=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	11*	05=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	12R	06=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	13E	07=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	14S	08=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	15E	09=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	16R	10=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	17V	11=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	18E	12=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	19D	13=PROCESS: _____	STATUS: _	YEAR: _____	SOURCE: _____	APPEAL: _____				
	20									
	21									
	22									
	23								MORE (Y/N): _	
	24	***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****								

Ln	0	1	2	3	4	5	6	7	8	
o	1	234567890123456789012345678901234567890123456789012345678901234567890								
	1C	IRMAA	INCOME RELATED MONTHLY ADJUSTMENT AMOUNT CALCULATOR						IRCA M070	
	20									
	3L		BENEFICIARY TAX DATA							
	4U									
	5M	*SELECT FILING STATUS: _								
	6N	1=SINGLE		4=HEAD OF HOUSEHOLD						
	7*	2=MARRIED FILING JOINTLY		5=QUALIFYING WIDOW/WIDOWER						
	80	3=MARRIED FILING SEPARATELY		6=MARRIED FILING SEPARATELY LIVING APART ALL YEAR.						
	9N									
	10E	*PREMIUM YEAR (CCYY): _____								
	11*									
	12R	ADJUSTED GROSS INCOME: _____	-	TAX EXEMPT INTEREST: _____						
	13E									
	14S		CALCULATOR RESULTS							
	15E									
	16R	FILING STATUS: _		PREMIUM YEAR (CCYY): _____		MAGI: _____		-		
	17V									
	18E	MODIFIED ADJUSTED GROSS INCOME RANGE _____		TO _____						
	19D									
	20	IRMAA LEVEL: _		IRMAA: _____						
	21									
	22									
	23									
	24	***** (LINE 24 RESERVED FOR OPERATING SYSTEMS INFORMATION) *****								