

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							IRSU M07A
	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	234567890123456789012345678901234567890123456789012345678901234567890							
	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	23456789012345678901234567890123456789012345678901234567890123456789012345678901234567890							
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: SSSSSSSS				
	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	2345678901234567890123456789012345678901234567890123456789012345678901234567890							
1C		IRMAA MANUAL IRMAA ADJUSTMENT						IRIA M07F	
20		SSN: SSSSSSSSS	NAME: SSSSSSSSSSSSSSS S	SSSSSSSSSSSSSSSSSSSSSS	DOB: SSSSSSS				
3L									
4U		CURRENT IRMAA DATA							
5M		PREMIUM YEAR: SSSS	TAX YEAR: SSSS	FILING STATUS: SSSSSSSSSSSSSSSSSSSSSSS					
6N		AGI: SSSSSSSSSSSS-	TAX EXEMPTINTEREST: SSSSSSSSSSS	IRMAA AMOUNT: SSSSSSSSSSS					
7*									
80		MANUAL IRMAA INPUT							
9N		*BENEFICIARY REPORT DATE (MMDDCCYY): _____				TAX YEAR (CCYY): _____			
10E		ADJUSTED GROSS INCOME: _____			-	TAX EXEMPT INTEREST: _____			
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		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							
1C		IRMAA		PENDING LIFE CHANGING EVENTS				IRLP M07H	
20		SSN: SSSSSSSSS		NAME: SSSSSSSSSSSSSSS S SSSSSSSSSSSSSSSSSSSSS				DOB: SSSSSSSS	
3L									
4U									
5M		*SELECT DESIRED EVENT: ___							
6N									
7*		01=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
80		02=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
9N		03=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
10E		04=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
11*		05=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
12R		06=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
13E		07=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
14S		08=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
15E		09=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
16R		10=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
17V		11=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
18E		12=REPORT	DATE: _____	EVENT: _____	DATE: _____	APPEAL: _____			
19D		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	23456789012345678901234567890123456789012345678901234567890123456789012345678901234567890								
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									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	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 SSSSSSSSSSSSSSSSSSSSS				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) *****								