

PCOM Session A

File Edit View Communication Actions Window Help

PrintScreen PrintSetup ShowPad Copy Paste Cut OQA Toolbar ExitAll

IRMAA LIFE CHANGING EVENT IRLC
SSN: [REDACTED] NAME: DOB:

***SELECT LIFE CHANGING EVENT:** █

1=DEATH OF SPOUSE	5=WORK STOPPED
2=MARRIAGE/REMARRIAGE	6=PENSION INCOME LOSS
3=DIVORCE/ANNULMENT	7=INCOME LOSS FROM INCOME PRODUCING PROPERTY
4=WORK REDUCTION	8=NON-QUALIFYING EVENT.

***DATE OF LIFE CHANGING EVENT (MMCCYY):** _____

***SELECT PROOF:** _ 1=PROVEN 2=NOT PROVEN 3=PENDING.

REMARKS: _____

PF1 HELP AVAILABLE

MB a 05/031

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IRMAA TAX INFORMATION IRMA

SSN: [REDACTED] NAME: DOB:

PREMIUM YEAR: 2009 TAX YEAR: 2008

*BENEFICIARY REPORT DATE (MMDDCCYY): [REDACTED]

ADJUSTED GROSS INCOME: [REDACTED] TAX EXEMPT INTEREST: [REDACTED]

SELECT TYPE: [REDACTED]

1=TAX RETURN 3=ESTIMATED TAX DATA 5=NO TAX FILING REQUIRED
 2=AMENDED TAX RETURN 4=IRS TAX CORRECTION DATA 6=IRS REPORTED DATA.

*SELECT FILING STATUS: [REDACTED]

1=SINGLE 4=HEAD OF HOUSEHOLD
 2=MARRIED FILING JOINTLY 5=QUALIFYING WIDOW/WIDOWER
 3=MARRIED FILING SEPARATELY 6=MARRIED FILING SEPARATELY LIVING APART ALL YEAR.

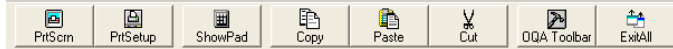
*SELECT PROOF: [REDACTED] 1=PROVEN 2=NOT PROVEN 3=PENDING. GOOD CAUSE (Y/N): [REDACTED]

REMARKS: [REDACTED]

PF1 HELP AVAILABLE

MB a 05/039

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IRMAA INCOME RELATED MONTHLY ADJUSTMENT RESULTS IRRE
SSN: [REDACTED] NAME: DOB:

CURRENT IRMAA DATA

PREMIUM YEAR: TAX YEAR: FILING STATUS:
AGI: TAX EXMP INTEREST: IRMAA AMOUNT:

RECALCULATED IRMAA DATA

PREMIUM YEAR: TAX YEAR: FILING STATUS:
AGI: TAX EXMP INTEREST: IRMAA AMOUNT:

NEW DETERMINATION RESULTS:

*PROCESS ALL TRANSACTIONS (Y/N):

MORE (Y/N): N

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IRMAA INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MAIN MENU IRMN
FIELD OFFICE: *UNIT: █

*BENEFICIARY SSN: _____

*SELECT THE DESIRED OPTION: _ 1=ESTABLISH 2=UPDATE 3=QUERY.
IF OPTION 1 SELECTED, INPUT PREMIUM YEAR (CCYY): _____

*SELECT THE DESIRED FUNCTION: _
1=LIFE CHANGING EVENT 2=TAX INFORMATION 3=MANUAL IRMAA ADJUSTMENT.
IF OPTION IS 1 AND FUNCTION IS 1 OR 2, ENTER TAX YEAR (CCYY): _____

*APPEAL INVOLVED (Y/N): _

TAX UPDATE PROCESSED SUCCESSFULLY - PRESS ANY PF KEY TO ENTER EVID

MB a 02/075

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