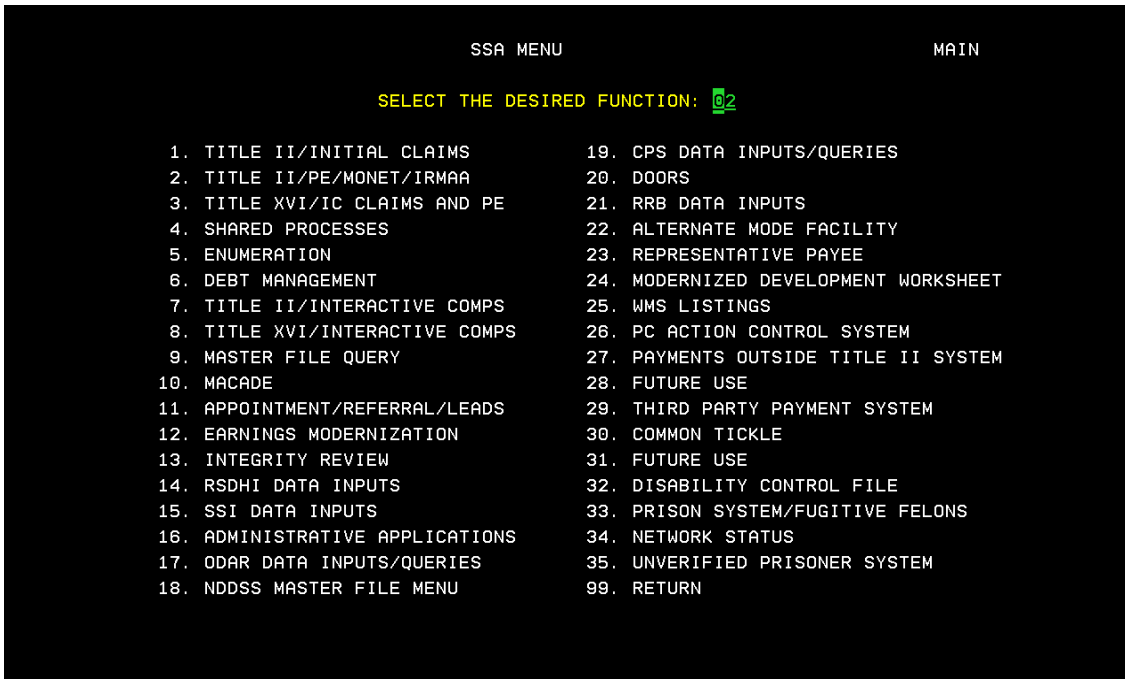
IRMAA Online Screen Changes: Release November 2010

Note:
Modifications will be made to the following IRMAA online screens for November 2010: IRSU, IRCA, IRIA and IRRE. Each screen scenario contains images with the expected changes for November. For comparison, a reference section is attached containing images of the previous IRCA, IRIA and IRRE screens without the November 2010 changes.

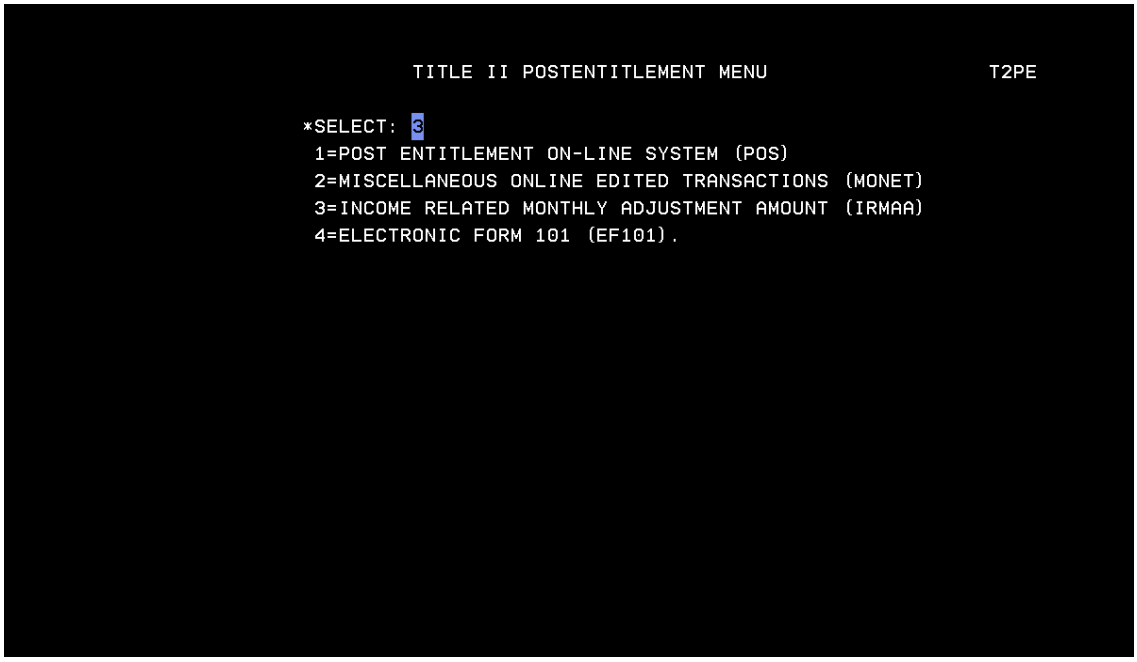
IRSU

The IRSU screen displays the INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) menu. Changes were made to add Part D information to page 2 of the F1 help screen.

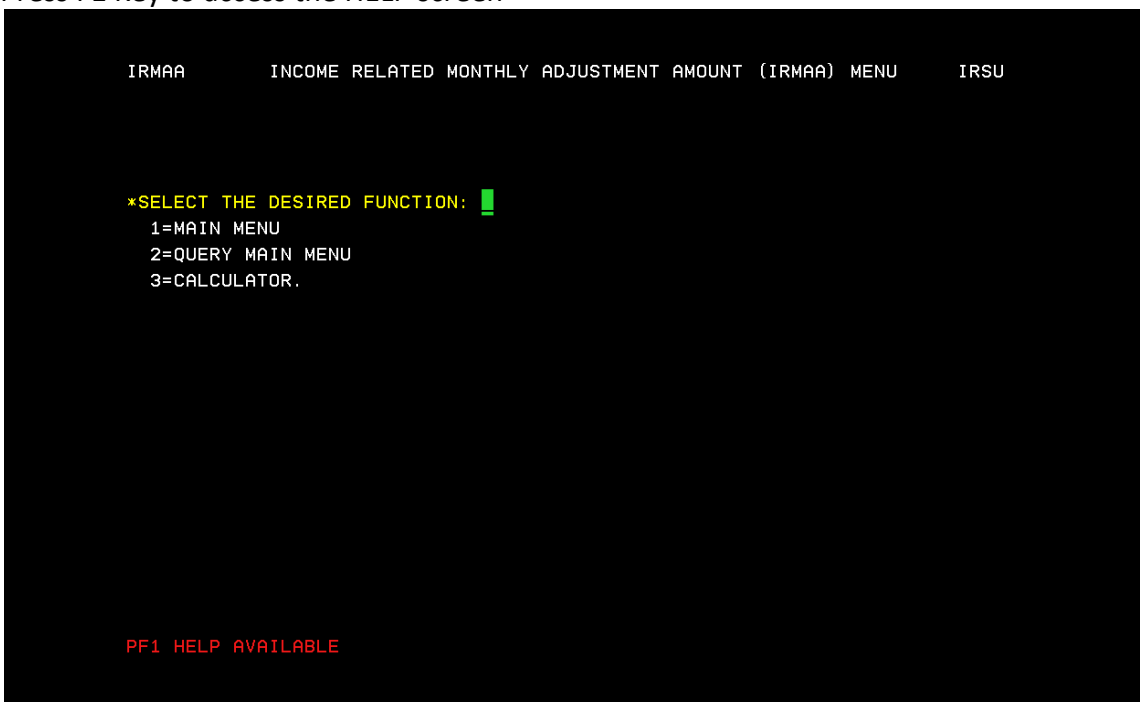
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu



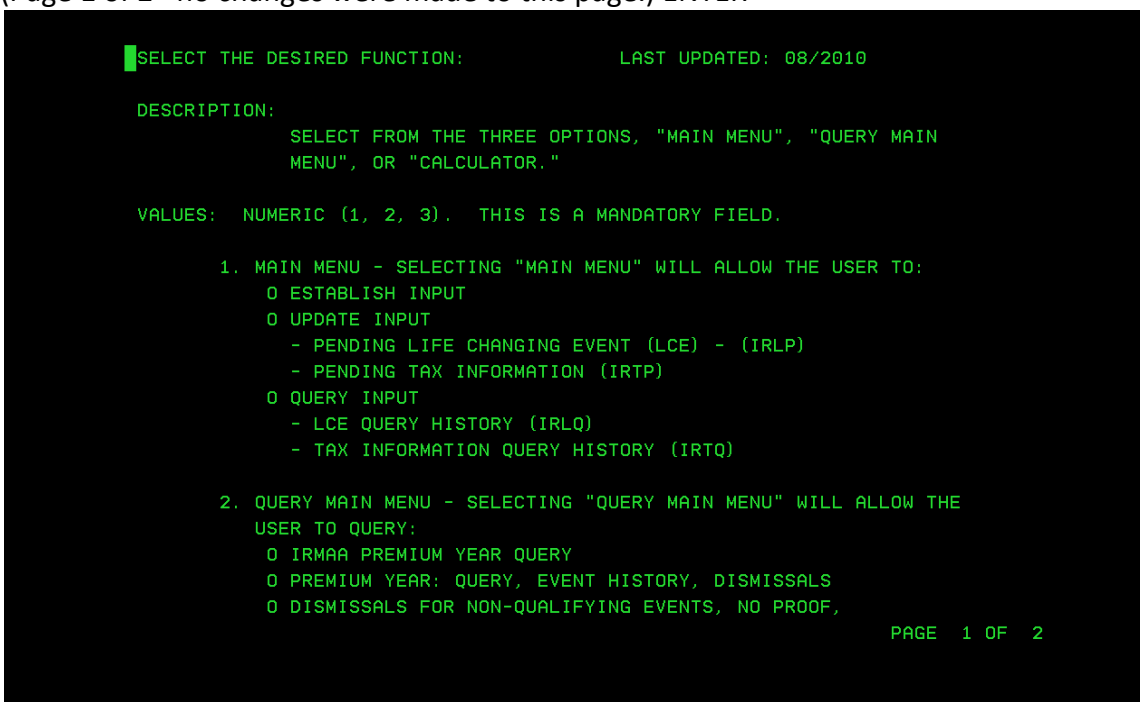
Select 3=INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) from the TITLE II POSTENTITLEMENT MENU.



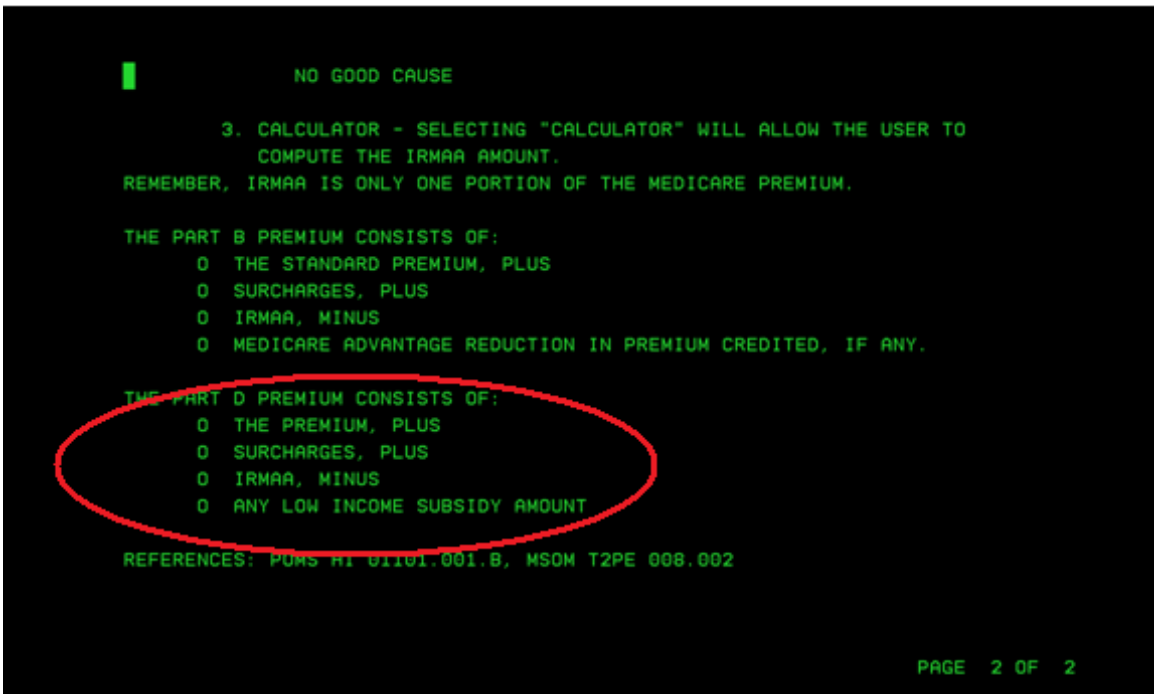
Press F1 Key to access the HELP screen



(Page 1 of 2 –no changes were made to this page.) ENTER



Part D Premium data added to Page 2 of 2



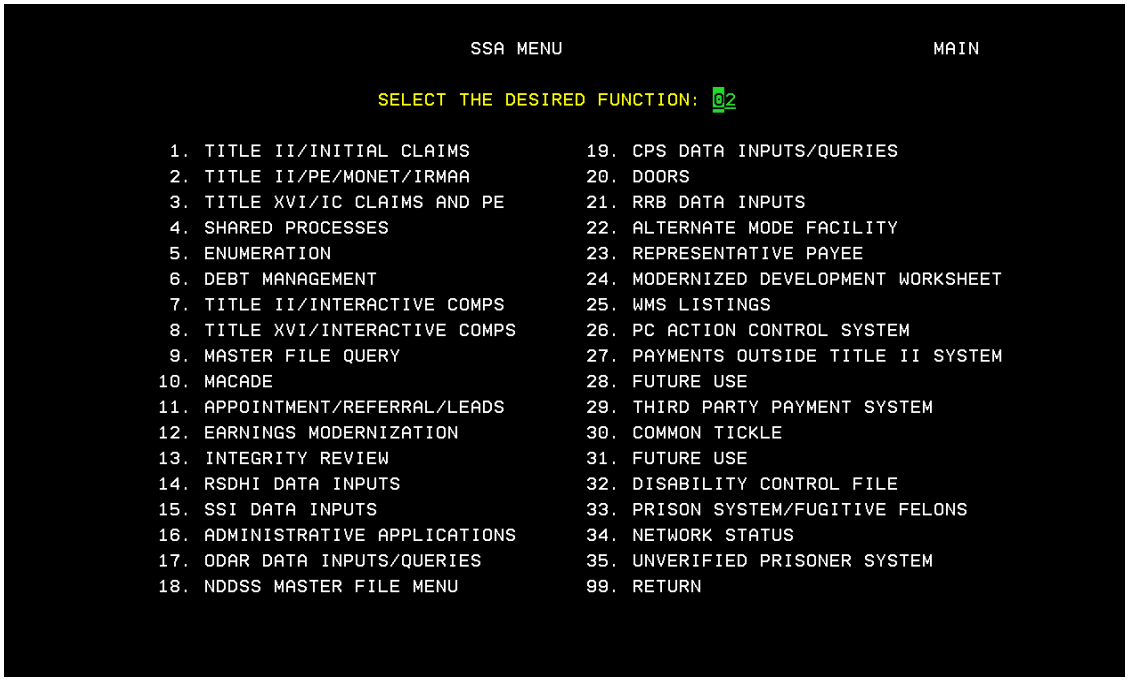
IRCA

The IRCA screen is an online IRMAA calculator that is used to determine an individual's IRMAA level, and its associated cost. Changes include a separate field for the Part B and Part D IRMAA Amounts.

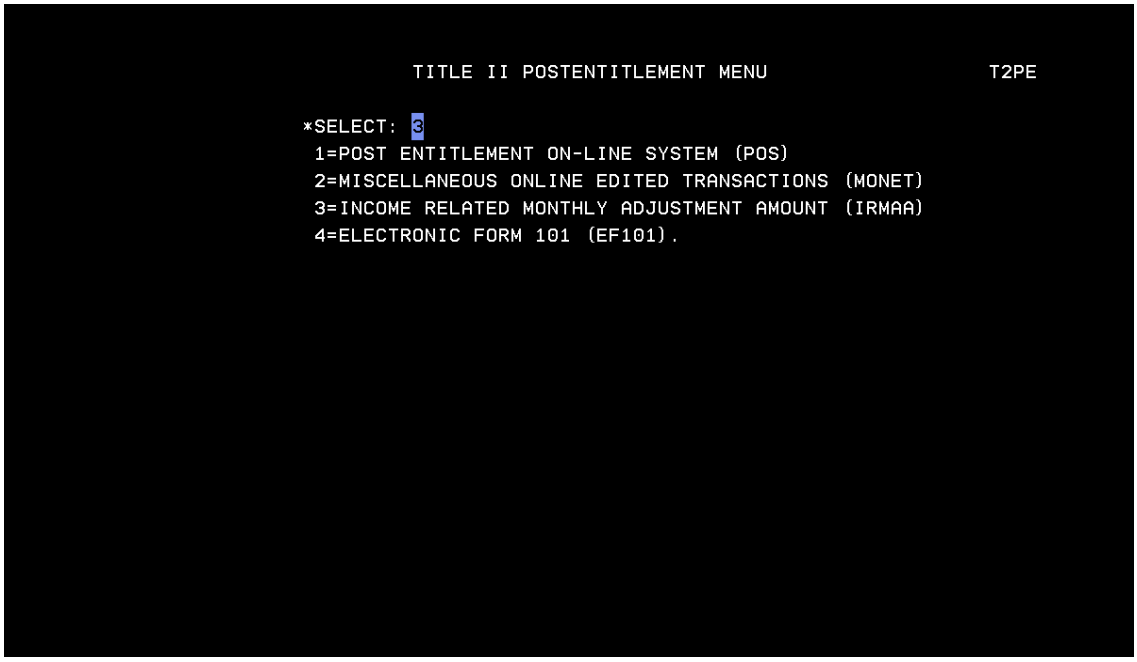
Test Scenario: Beneficiary reports a single filing status for Premium Year 2011. The adjusted gross income is projected as $500,000.00 with tax-exempt interest equal to $65,000.00.

Results: Beneficiaries' total MAGI for Premium year 2011 are computed as $565,000. As a result, NH will be subject to level 4 IRMAA. $255.10 will be applied to the Part B Premium and $71.40 will be applied to the Part D Premium.

Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

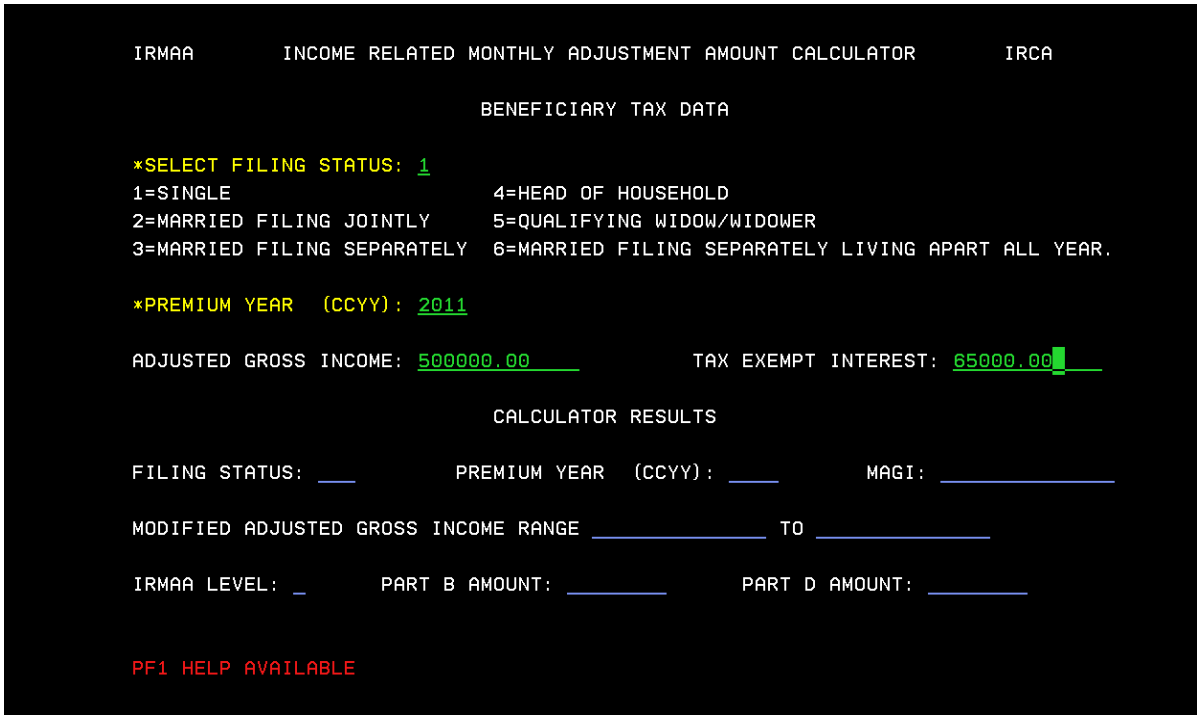


Select 3=INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) from the TITLE II POSTENTITLEMENT MENU.

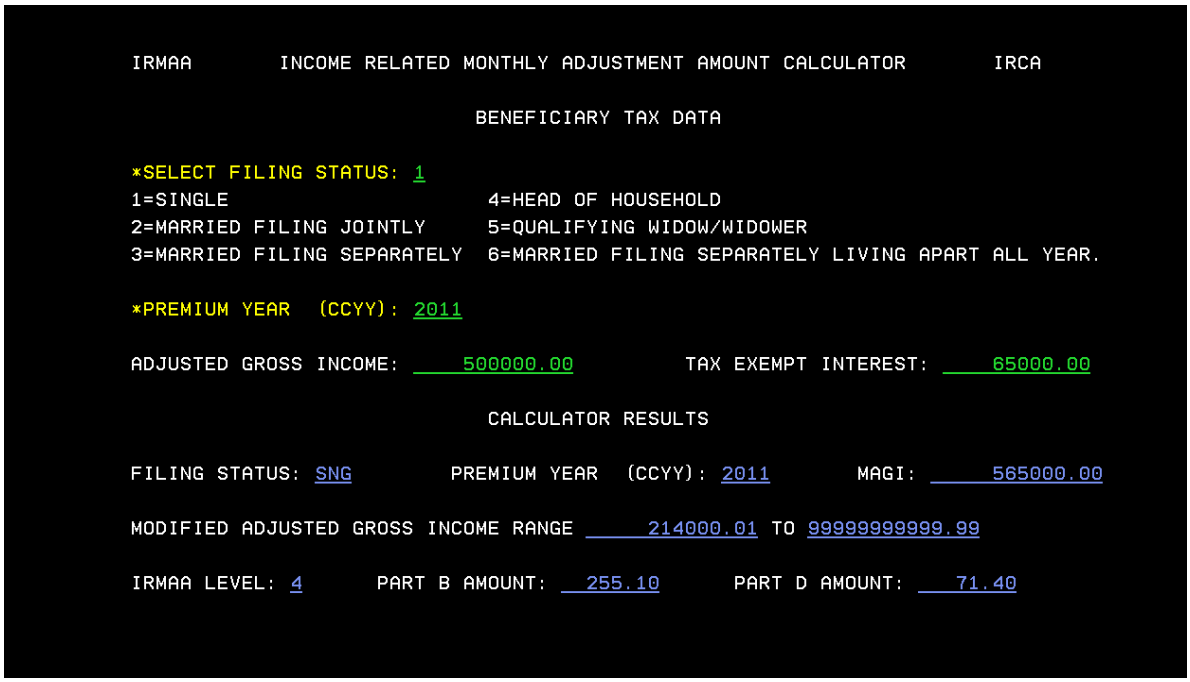


Select 3=CALCULATOR from the INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MENU.

Enter Claimant's: filing status, Premium Year affected Adjusted Gross Income, and Tax Exempt Interest. Press enter for new IRMAA calculation results.



Enter



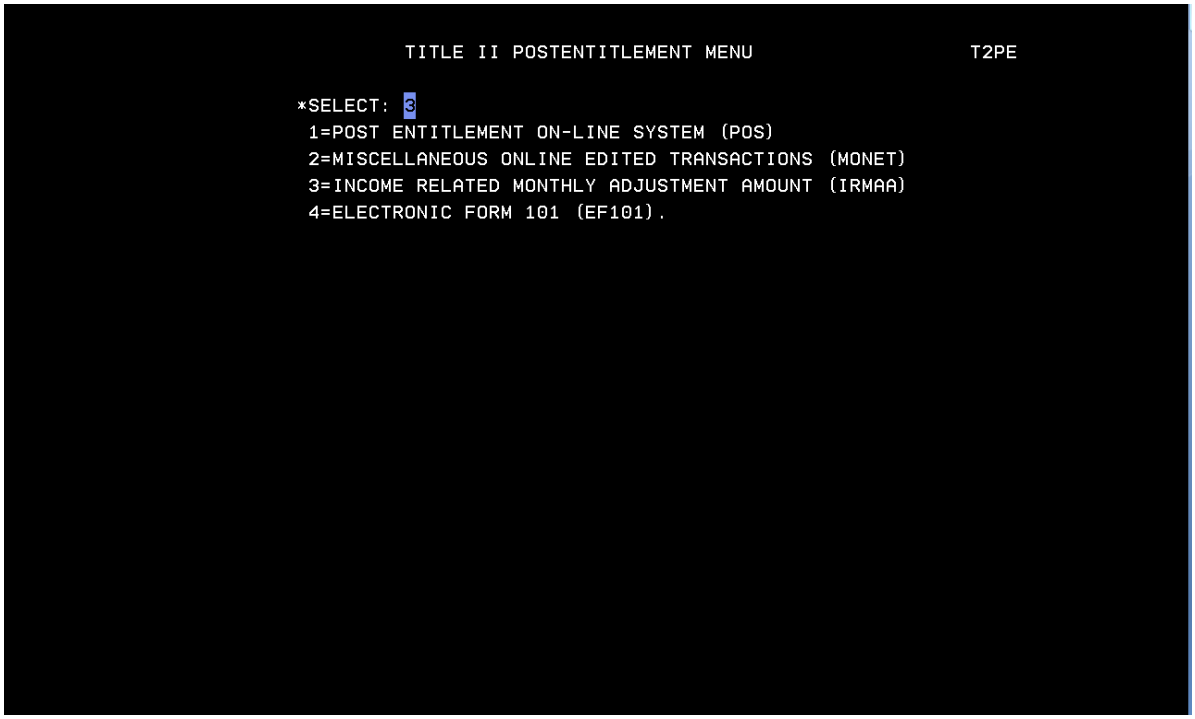
IRIA

The IRIA is used to manually compute and process a change to the current IRMAA level. Changes include separate IRMAA levels listed for Part B and Part D.

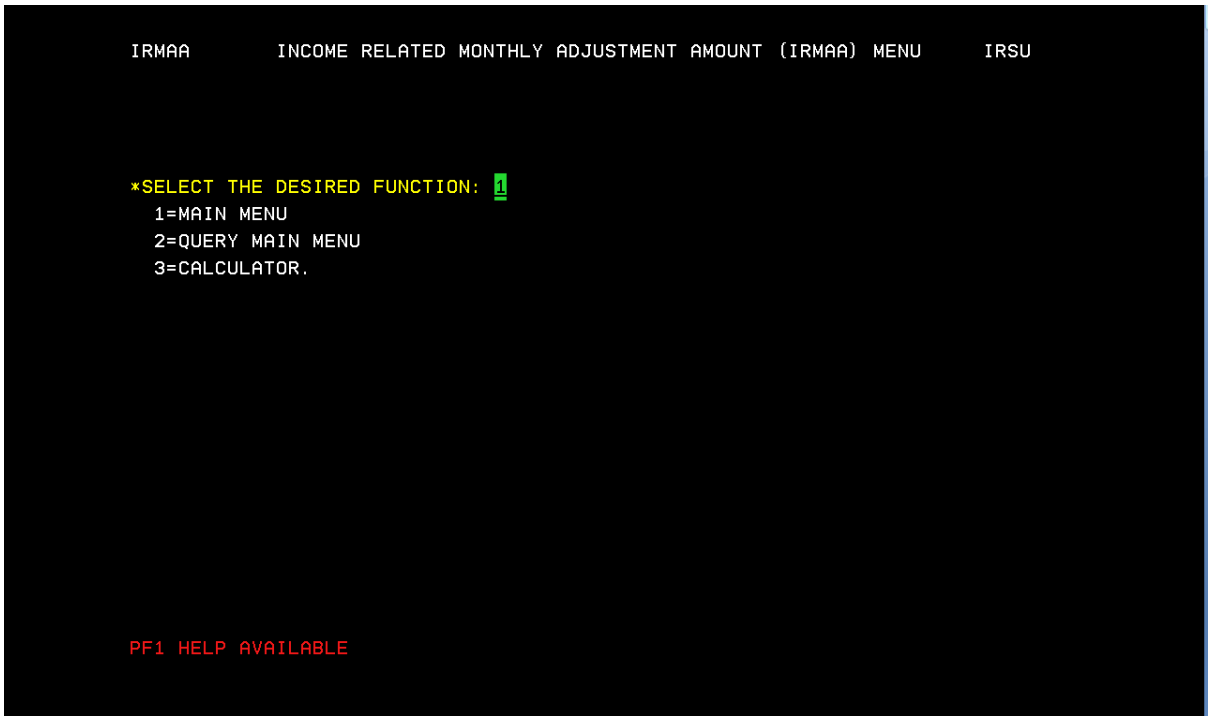
Test Scenario: Based on 2009 tax data (Adjusted Gross Income (AGI) = $100,000.00 and Tax Exempt Interest (TEI) = $80,000.00), beneficiary is currently subject to level 1 IRMAA for premium year 2011. On 9/14/2010, beneficiary reports a projected increase in income for the 2011 tax year. The new estimated AGI= $450,000.00 with a TEI of $50,000.00. Based on filing status "single", a manual IRMAA adjustment is done to increase the individuals IRMAA level.

Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

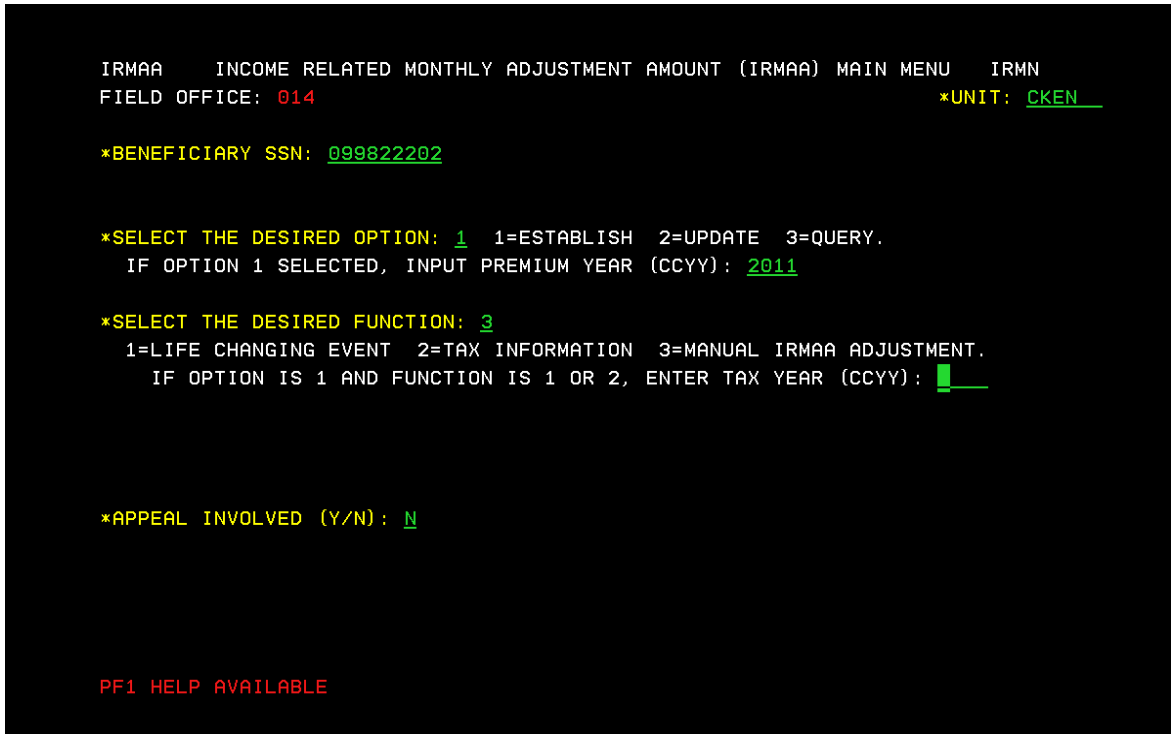
Select 3=INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) from the TITLE II POSTENTITLEMENT MENU.



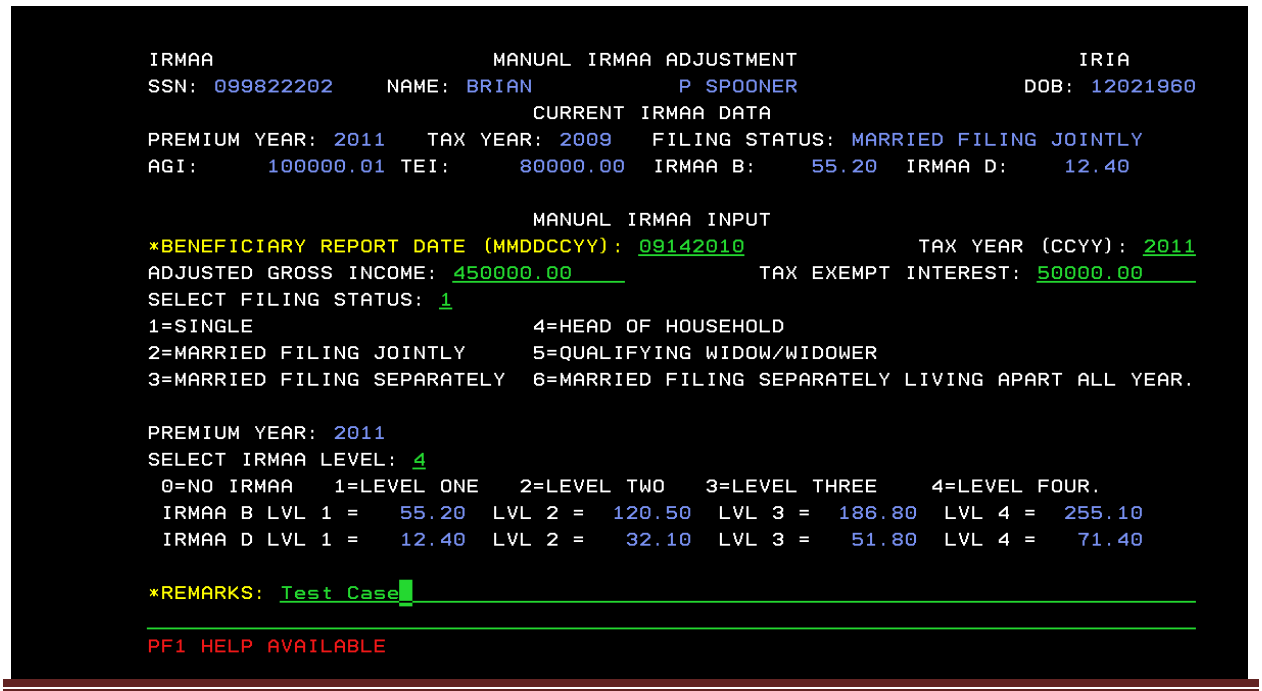
Select 1=MAIN MENU from the INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MENU.



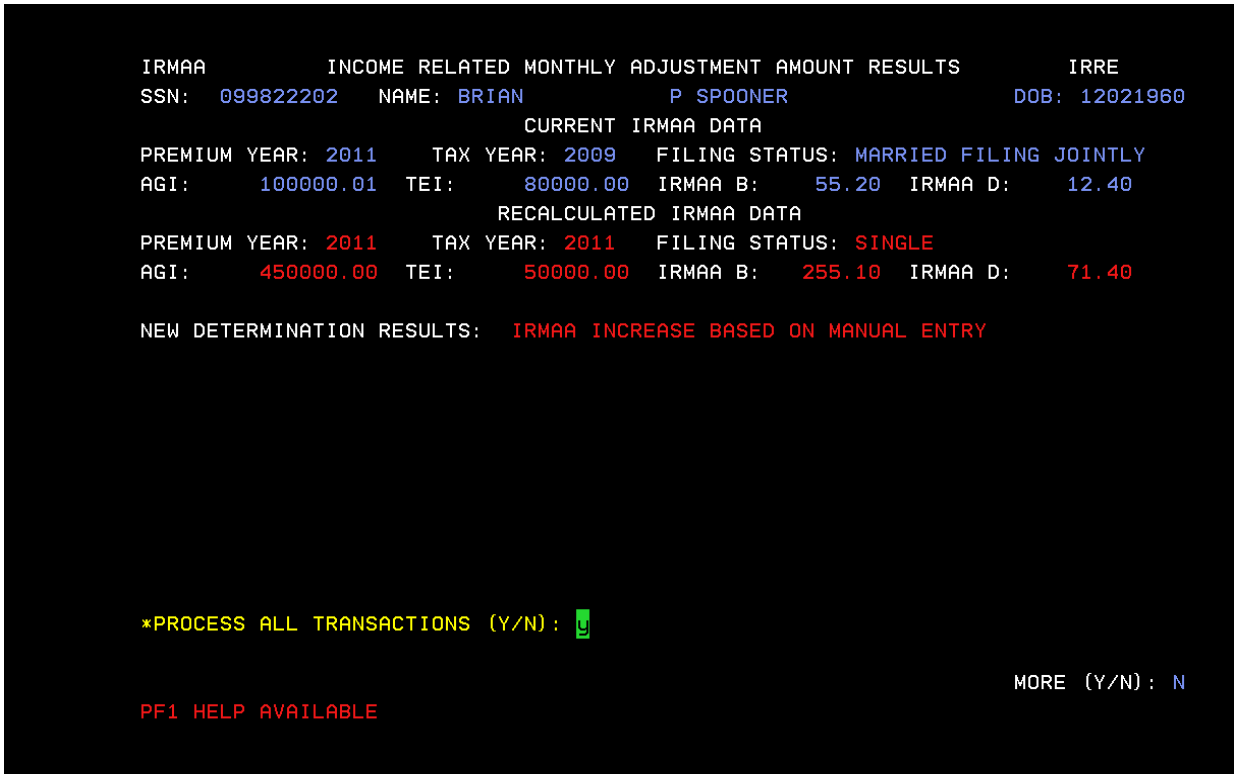
Enter Unit code, Beneficiary SSN, 1=ESTABLISH, Premium year affected, 3=MANUAL IRMAA ADJUSTMENT, and enter



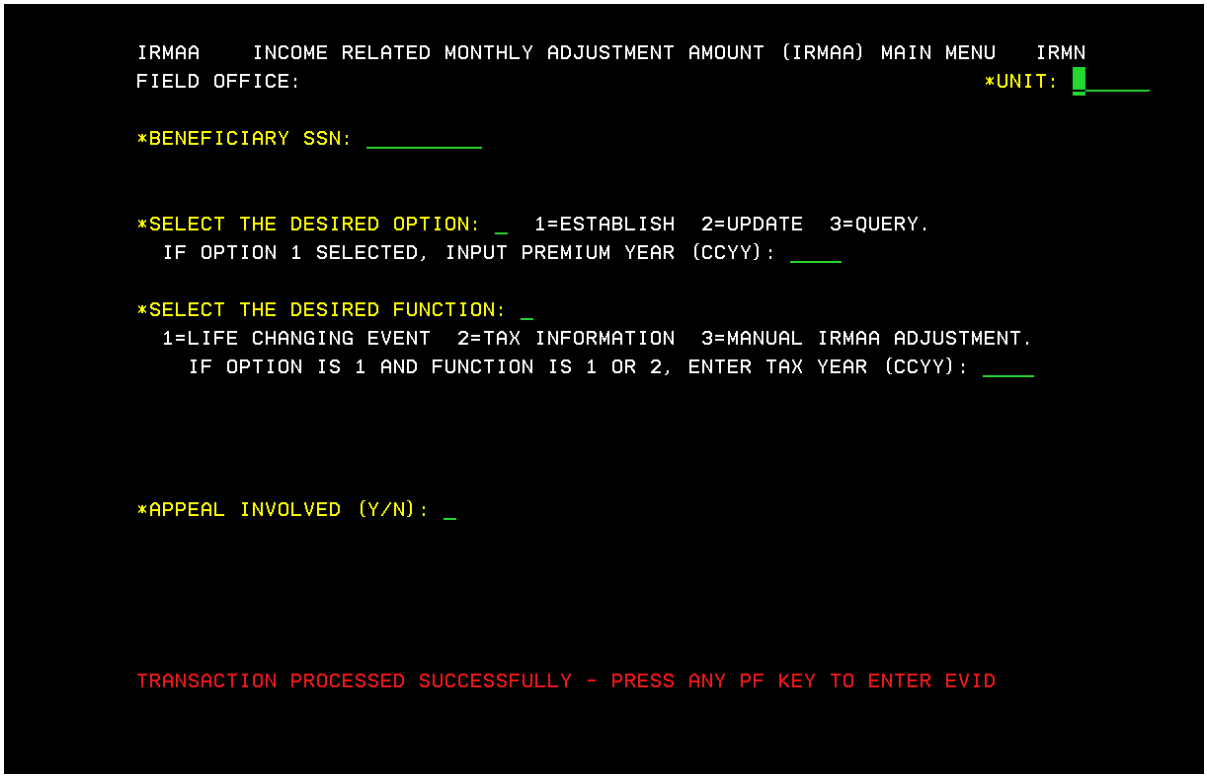
Screen will display current IRMAA data. Enter Beneficiary report date, tax year, Adjusted Gross Income, Tax Exempt Interest, filing status, and select an IRMAA level. (In unsure of correct IRMAA level, use calculator (IRCA Screen) to determine correct level based on the AGI and TEI.)



The IRRE screen will display the old and new IRMAA data, and provide the new determination results. To complete the transaction and update changes to the record enter a “y” in the “PROCESS ALL TRANSACTIONS (Y/N)” field, and enter.



You will then be redirected to the main menu. If transaction processed successfully, a note stating, “TRANSACTION PROCESSED SUCCESSFULLY-PRESS ANY PF KEY TO ENTER EVID” will be displayed on the bottom of the screen in red.



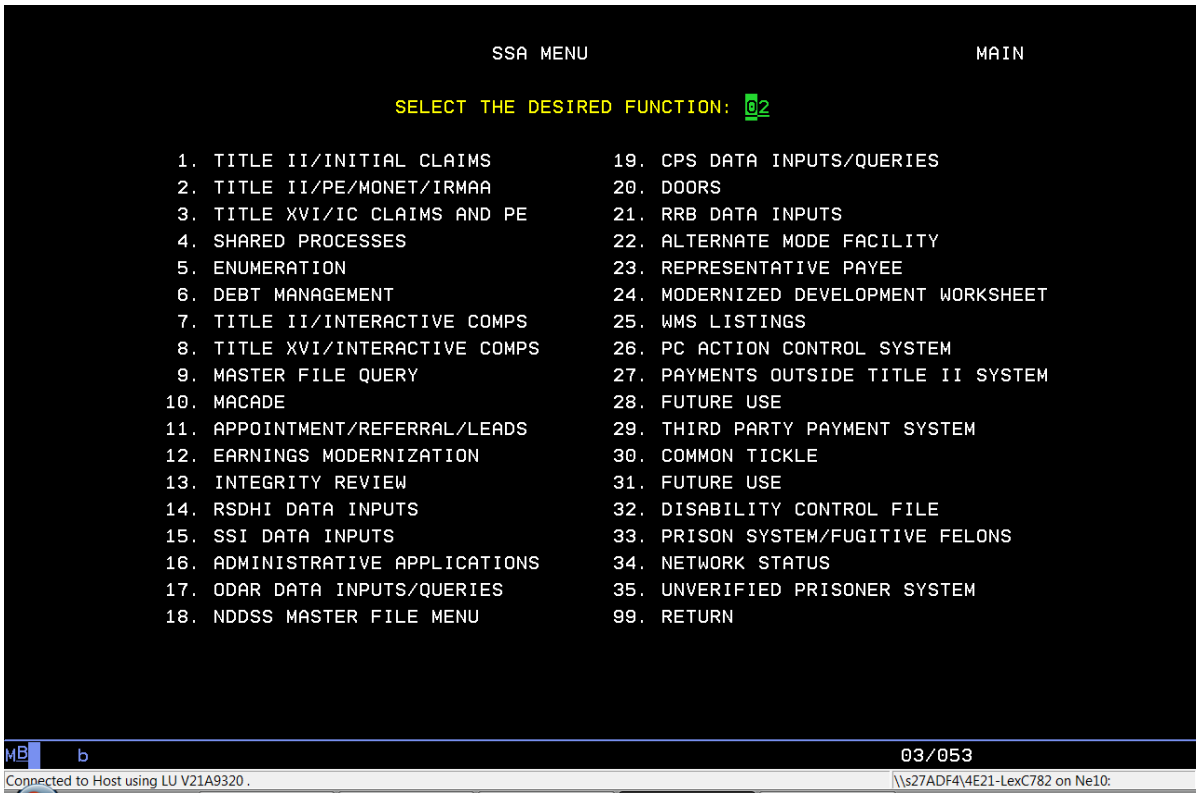
IRRE

IRRE screen appears in the path of a Life Changing Event (LCE) and a Manual IRMAA Adjustment. It shows you current IRMAA data (if available) and shows recalculated data based on the entries made in the data collection process. The IRRE screen also allows you to process dismissals and updates to a beneficiary's IRMAA.

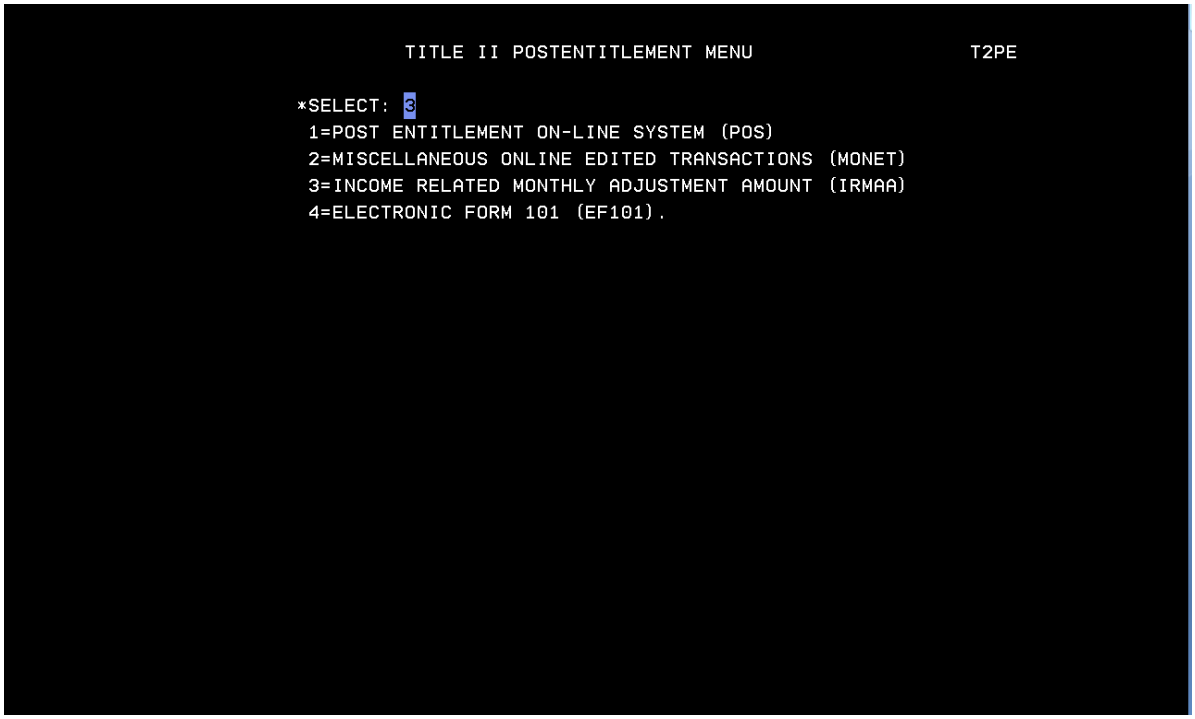
Test Scenario: NH is currently charged Level 3 IRMAA. He reports LCE for the 2010 tax year, 2011 Premium year. NH married and provided estimated tax data. NH's AGI is $600,000.00 with a TEI of $40,000.00. Filing status is married filing separately.

Results: LCE is keyed with the estimated tax data, and results in a dismissal.

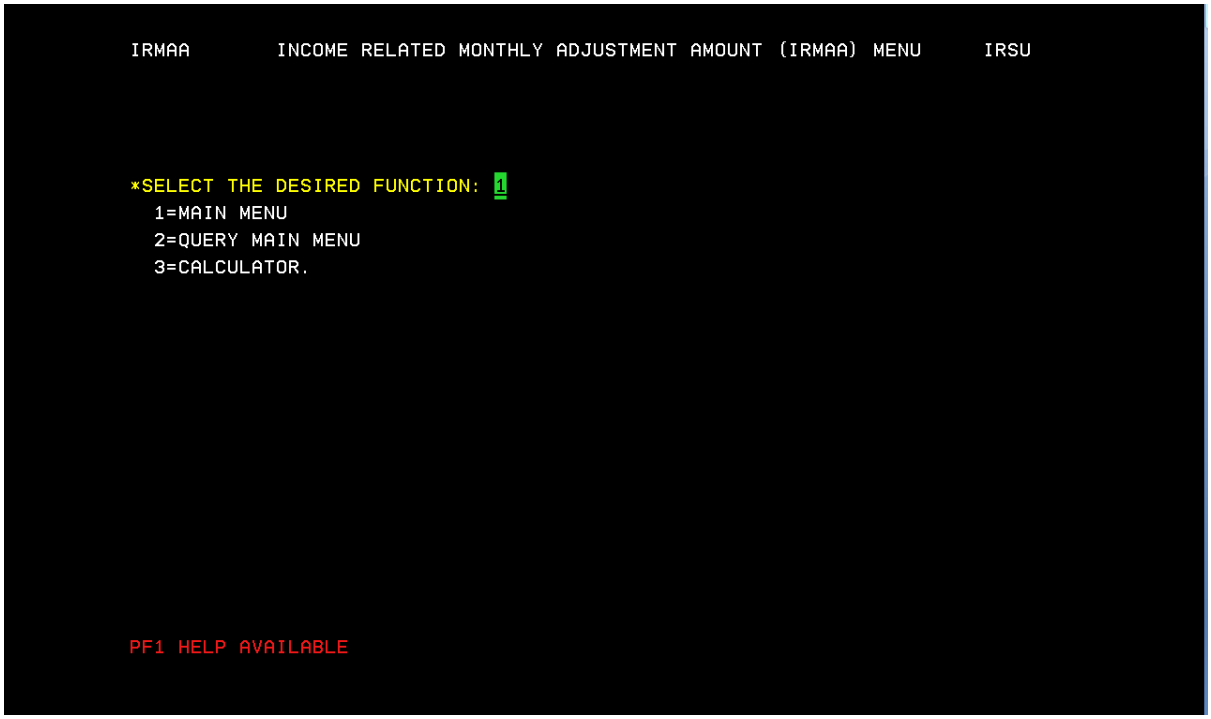
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu



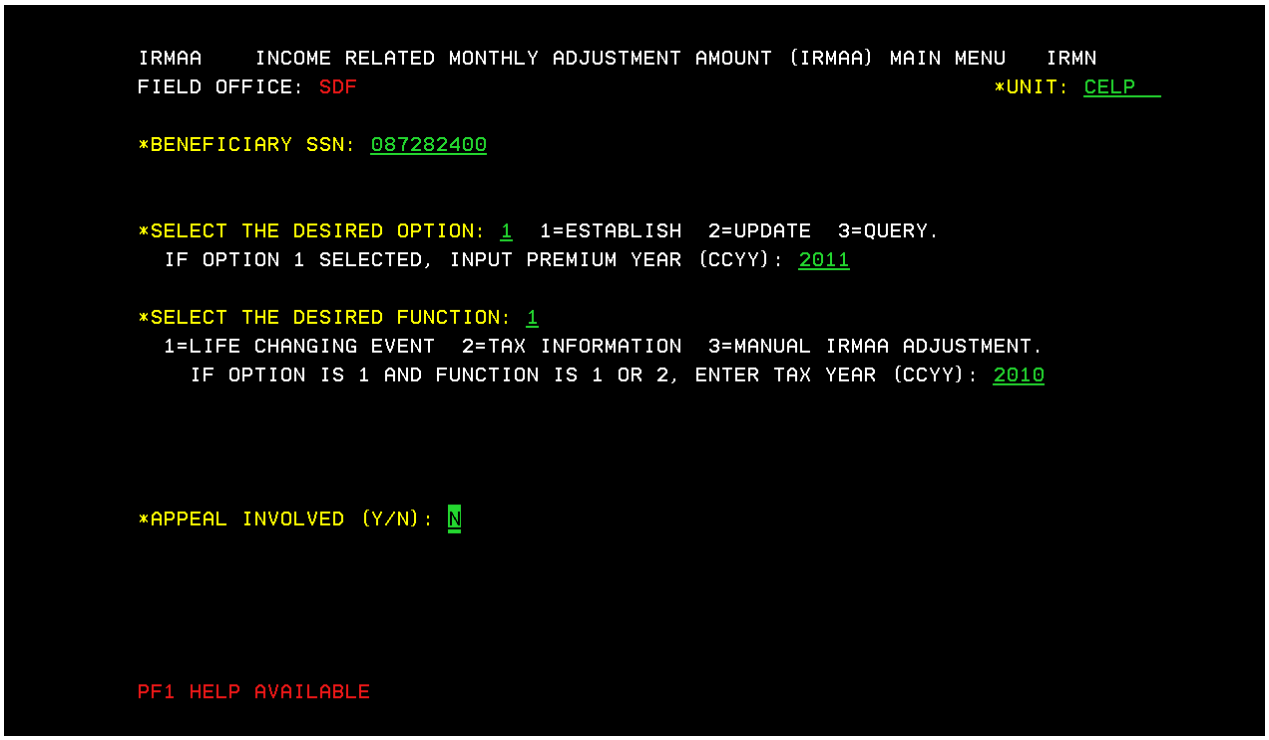
Select 3=INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) from the TITLE II POSTENTITLEMENT MENU.



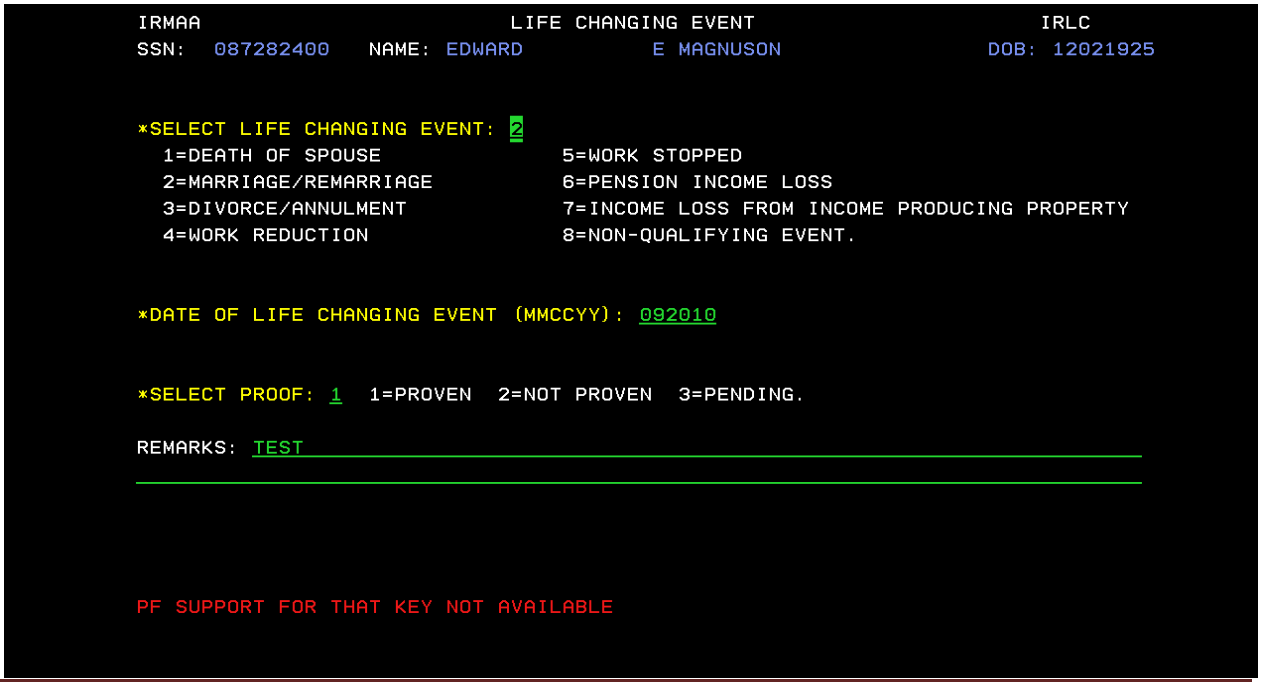
Select 1=MAIN MENU from the INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MENU.



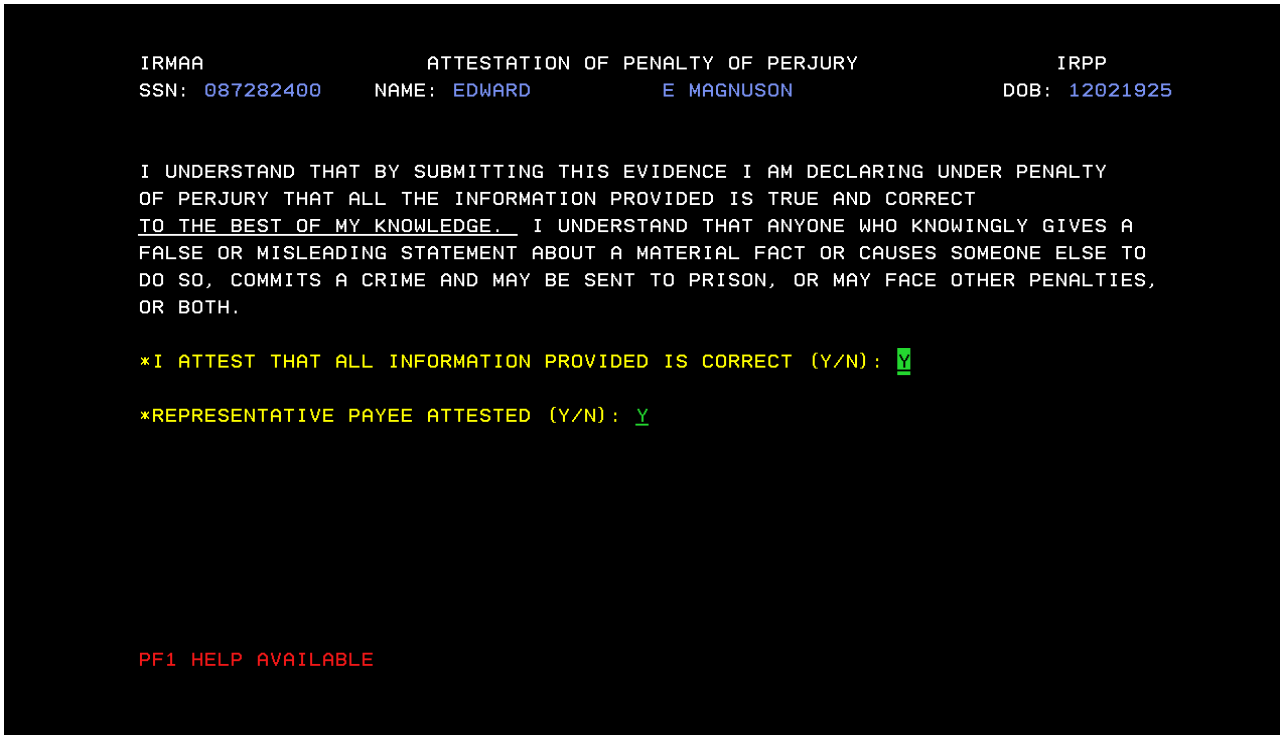
Enter UNIT Code, BENEFICIARY SSN, 1=ESTABLISH, Premium Year, 1=LIFE CHANGING EVENT (for LCE changes that may result in a dismissal) or 3=MANUAL IRMAA ADJUSTMENT (will result in an increase or decrease of IRMAA amount). If LCE selection is made a "Tax Year" must be entered.



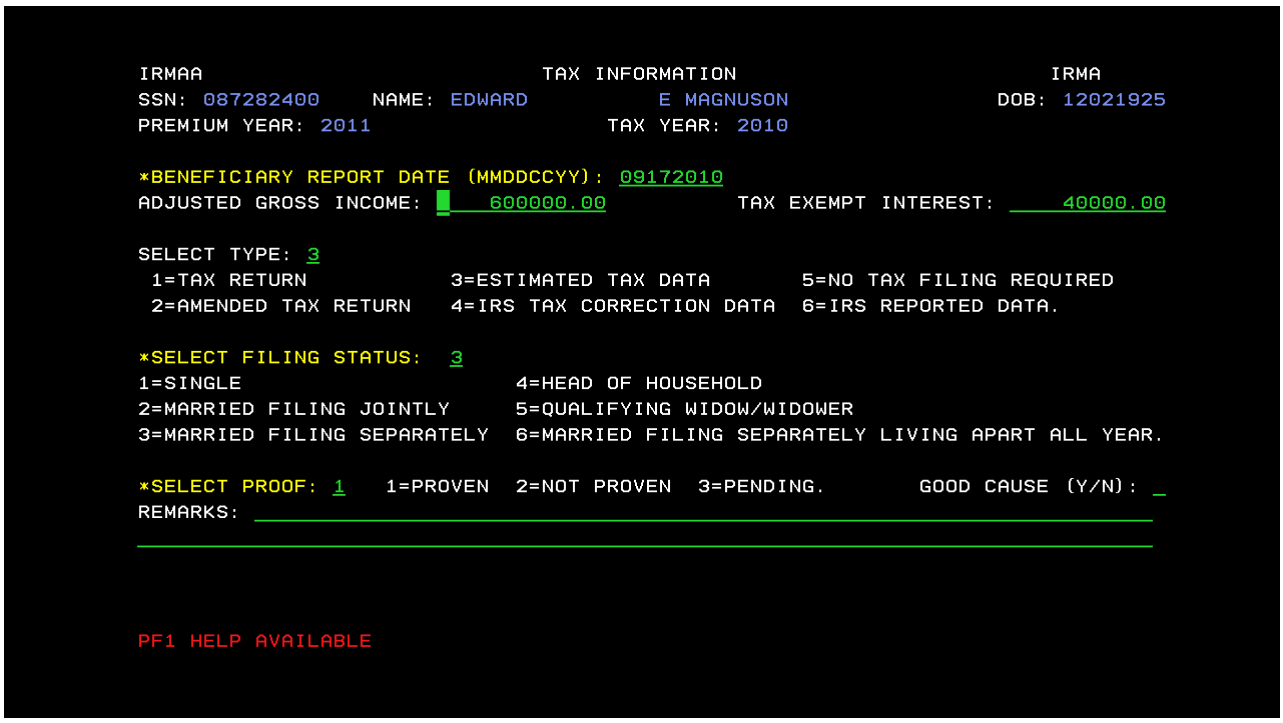
Select a LCE from the menu. Enter the "MMYYYY" of the event, and if proof has been attained. Enter



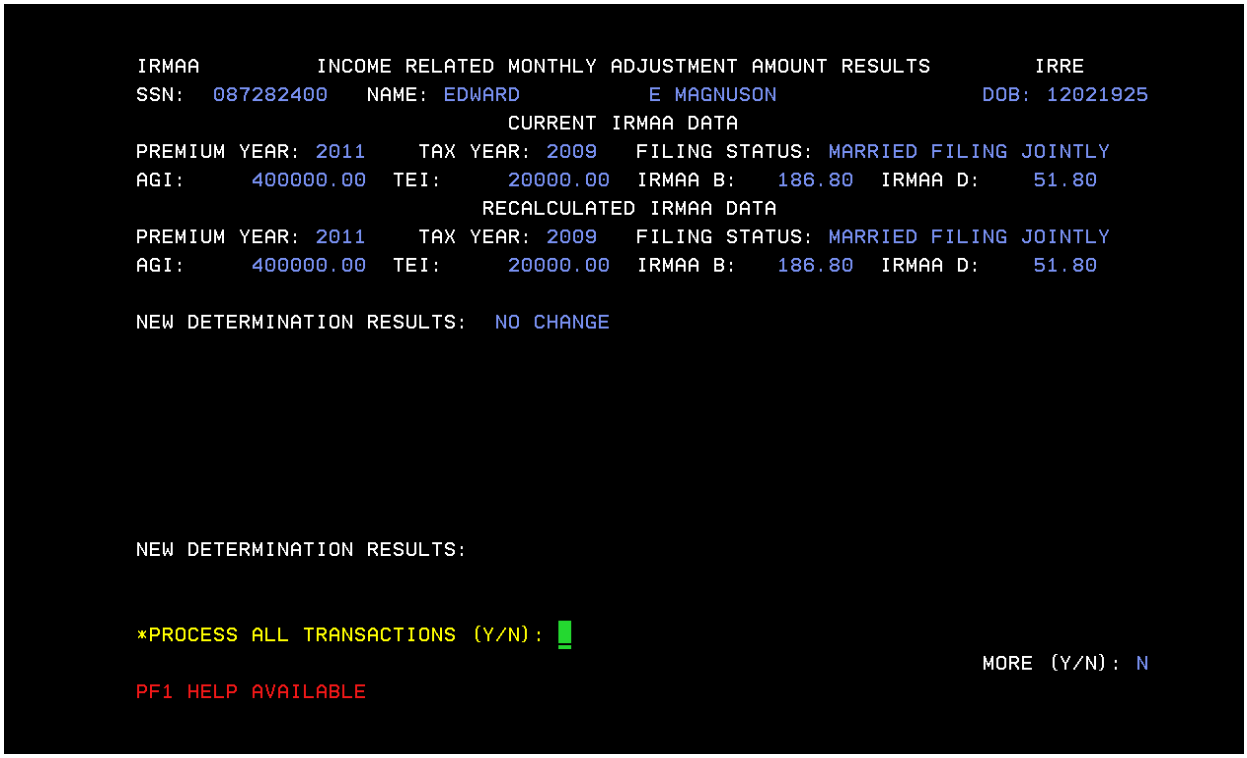
Enter a “Y/N” if Beneficiary or Representative Payee Attest that all information is true and correct. Enter



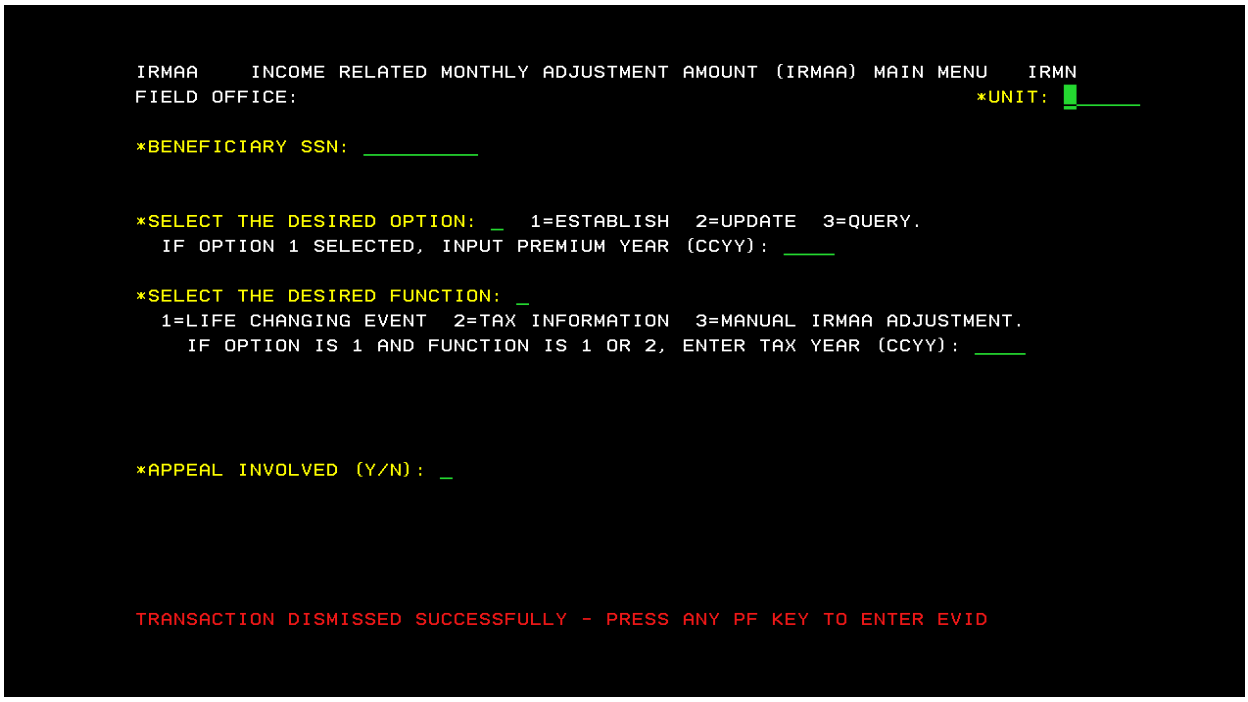
Enter the BENEFICIARY REPORT DATE, AGI, TEI, type of tax data submitted, FILING STATUS, and Proof of evidence. Enter



IRRE Screen displays prior and current IRMAA data and the new determination results. Enter a "Y" to process transaction to completion. Enter



Determination results of "NO CHANGE" will result in a dismissal and the screen below will be displayed.



If transaction processed successfully, a new IRMAA determination will be displayed, and the following screens will appear:

```
IRMAA          INCOME RELATED MONTHLY ADJUSTMENT AMOUNT RESULTS        IRRE
SSN:  003949106    NAME: JULIETTE        M WILLIAMSON             DOB: 03201939
                              CURRENT IRMAA DATA
PREMIUM YEAR: 2011     TAX YEAR: 2008    FILING STATUS: QUALIFYING WIDOW/WIDOWER
AGI:       80000.01  TEI:       5000.00  IRMAA B:     55.20  IRMAA D:     12.40
                            RECALCULATED IRMAA DATA
PREMIUM YEAR: 2011     TAX YEAR: 2009    FILING STATUS: SINGLE
AGI:      150000.00  TEI:      50000.00  IRMAA B:    186.80  IRMAA D:     51.80

NEW DETERMINATION RESULTS:  IRMAA INCREASE









*PROCESS ALL TRANSACTIONS (Y/N): Y

                                                          MORE (Y/N): N
PF1 HELP AVAILABLE
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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): _




TRANSACTION PROCESSED SUCCESSFULLY - PRESS ANY PF KEY TO ENTER EVID
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Reference:

IRSU

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SELECT THE DESIRED FUNCTION:            LAST UPDATED: 06/2006

 DESCRIPTION:
              SELECT FROM THE THREE OPTIONS, "MAIN MENU", "QUERY MAIN
              MENU", OR "CALCULATOR."

 VALUES:  NUMERIC (1, 2, 3).  THIS IS A MANDATORY FIELD.

        1. MAIN MENU - SELECTING "MAIN MENU" WILL ALLOW THE USER TO:
            O ESTABLISH INPUT
            O UPDATE INPUT
              - PENDING LIFE CHANGING EVENT (LCE) - (IRLP)
              - PENDING TAX INFORMATION (IRTP)
            O QUERY INPUT
              - LCE QUERY HISTORY (IRLQ)
              - TAX INFORMATION QUERY HISTORY (IRTQ)

        2. QUERY MAIN MENU - SELECTING "QUERY MAIN MENU" WILL ALLOW THE
           USER TO QUERY:
            O IRMAA PREMIUM YEAR QUERY
            O PREMIUM YEAR: QUERY, EVENT HISTORY, DISMISSALS
            O DISMISSALS FOR NON-QUALIFYING EVENTS, NO PROOF,
                                                          PAGE  1 OF  2
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              NO GOOD CAUSE

        3. CALCULATOR - SELECTING "CALCULATOR" WILL ALLOW THE USER TO
           COMPUTE THE IRMAA AMOUNT.
REMEMBER, IRMAA IS ONLY A PART OF THE MEDICARE PART B PREMIUM.  THE PART
B PREMIUM CONSISTS OF:
            O  THE STANDARD PREMIUM, PLUS
            O  SURCHARGES, PLUS
            O  IRMAA, MINUS
            O  MEDICARE ADVANTAGE REDUCTION IN PREMIUM CREDITED, IF ANY.

REFERENCES: POMS HI 01101.001.B, MSOM T2PE 008.002

                                                          PAGE  2 OF  2
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IRCA

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IRMAA       INCOME RELATED MONTHLY ADJUSTMENT AMOUNT CALCULATOR       IRCA

                            BENEFICIARY TAX DATA

*SELECT FILING STATUS:
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.

*PREMIUM YEAR  (CCYY): ____

ADJUSTED GROSS INCOME: _____________        TAX EXEMPT INTEREST: _____________

                            CALCULATOR RESULTS

FILING STATUS: ___        PREMIUM YEAR  (CCYY): ____       MAGI: _____________

MODIFIED ADJUSTED GROSS INCOME RANGE _____________ TO _____________

IRMAA LEVEL: _      IRMAA: ________


PF1 HELP AVAILABLE
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IRIA

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IRMAA                      MANUAL IRMAA ADJUSTMENT                      IRIA
SSN:              NAME:                                          DOB: 10091923

                           CURRENT IRMAA DATA
PREMIUM YEAR: 2007   TAX YEAR: 2005   FILING STATUS: QUALIFYING WIDOW/WIDOWER
AGI:     100000.01 TAX EXEMPT INTEREST:    100000.00  IRMAA AMOUNT:      67.90

                           MANUAL IRMAA INPUT
*BENEFICIARY REPORT DATE (MMDDCCYY): 11062006          TAX YEAR (CCYY): 2005
ADJUSTED GROSS INCOME: 50000.00          TAX EXEMPT INTEREST: 50000.00

SELECT FILING STATUS: 5
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.

PREMIUM YEAR: 2007
SELECT IRMAA AMOUNT: 1
 0=NO IRMAA                   2=LEVEL TWO    30.90        4=LEVEL FOUR    67.90
 1=LEVEL ONE    12.30         3=LEVEL THREE    49.40


PF1 HELP AVAILABLE
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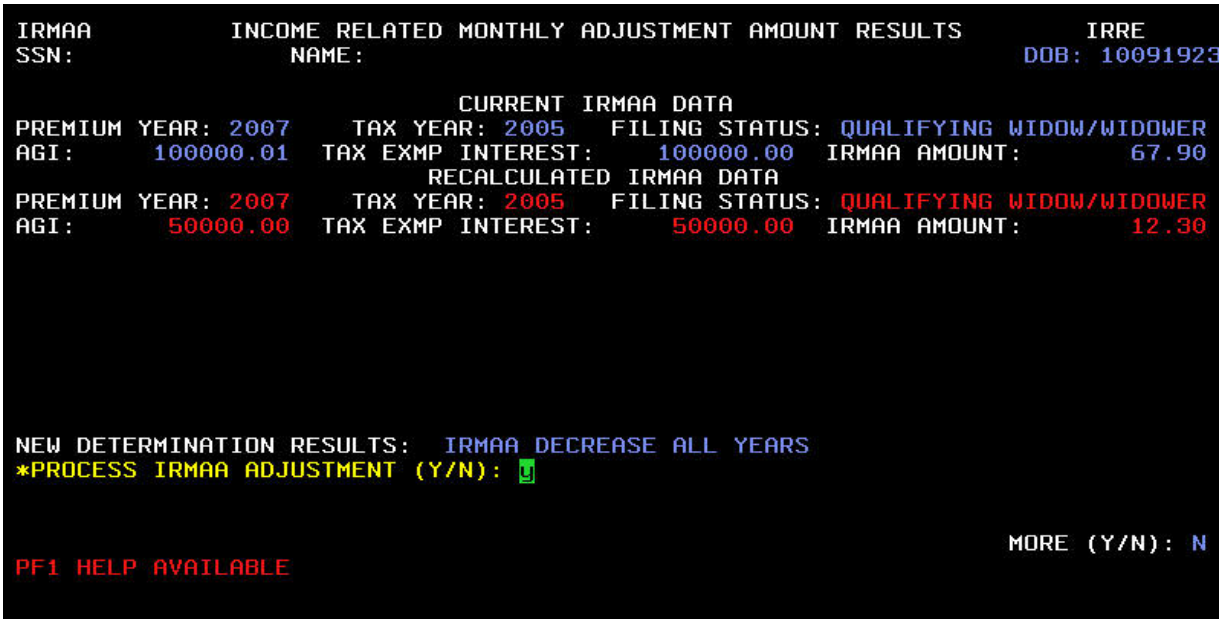
IRRE


IRMAA INCOME RELATED MONTHLY ADJUSTMENT AMOUNT RESULTS IRRE
SSN: NAME: DOB: 10091923
CURRENT IRMAA DATA
PREMIUM YEAR: 2007 TAX YEAR: 2005 FILING STATUS: QUALIFYING WIDOW/WIDOWER
AGI: 100000.01 TAX EXMP INTEREST: 100000.00 IRMAA AMOUNT: 67.90
RECALCULATED IRMAA DATA
PREMIUM YEAR: 2007 TAX YEAR: 2005 FILING STATUS: QUALIFYING WIDOW/WIDOWER
AGI: 50000.00 TAX EXMP INTEREST: 50000.00 IRMAA AMOUNT: 12.30
NEW DETERMINATION RESULTS: IRMAA DECREASE ALL YEARS
*PROCESS IRMAA ADJUSTMENT (Y/N): Y
MORE (Y/N): N
PF1 HELP AVAILABLE