

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):** \_\_\_\_\_

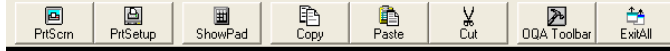
**\*SELECT PROOF:** \_ 1=PROVEN 2=NOT PROVEN 3=PENDING.

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: \_\_\_\_\_ TAX EXEMPT INTEREST: \_\_\_\_\_

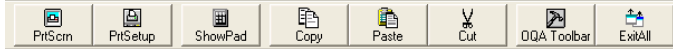
SELECT TYPE: \_  
1=TAX RETURN 3=ESTIMATED TAX DATA 5=NO TAX FILING REQUIRED  
2=AMENDED TAX RETURN 4=IRS TAX CORRECTION DATA 6=IRS REPORTED DATA.

\*SELECT FILING STATUS: \_  
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: \_ 1=PROVEN 2=NOT PROVEN 3=PENDING. GOOD CAUSE (Y/N): \_  
REMARKS: \_\_\_\_\_

PF1 HELP AVAILABLE





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

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): \_

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

MB a 02/075

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