

IRMAA Online Screen Changes: Release November 2010

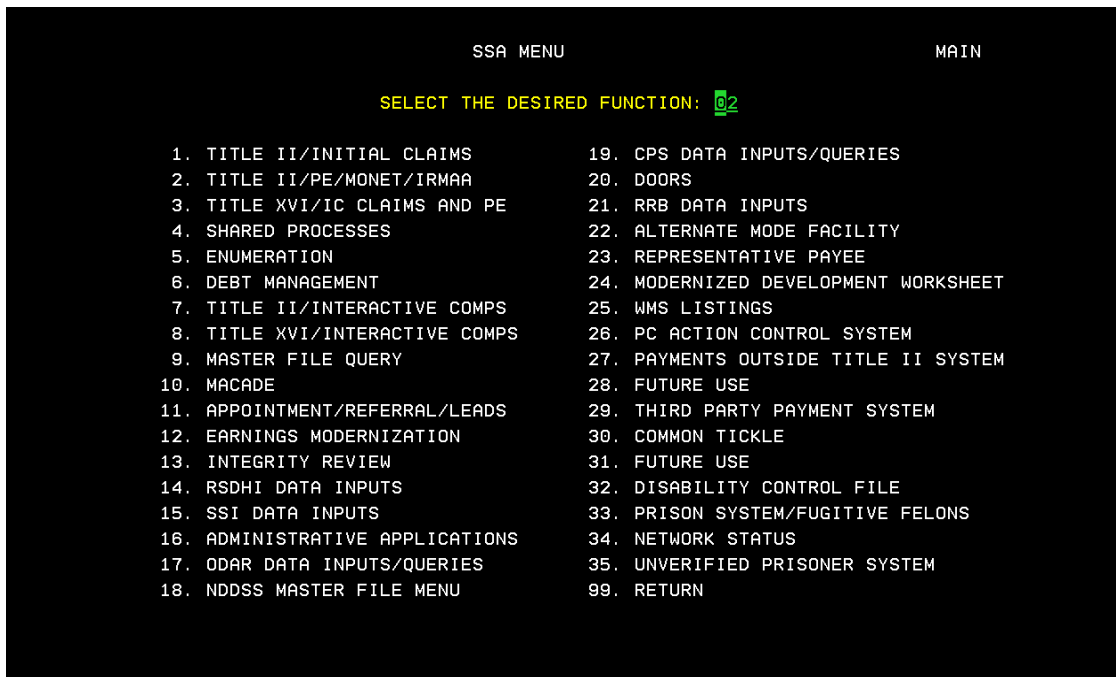
Note:

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.

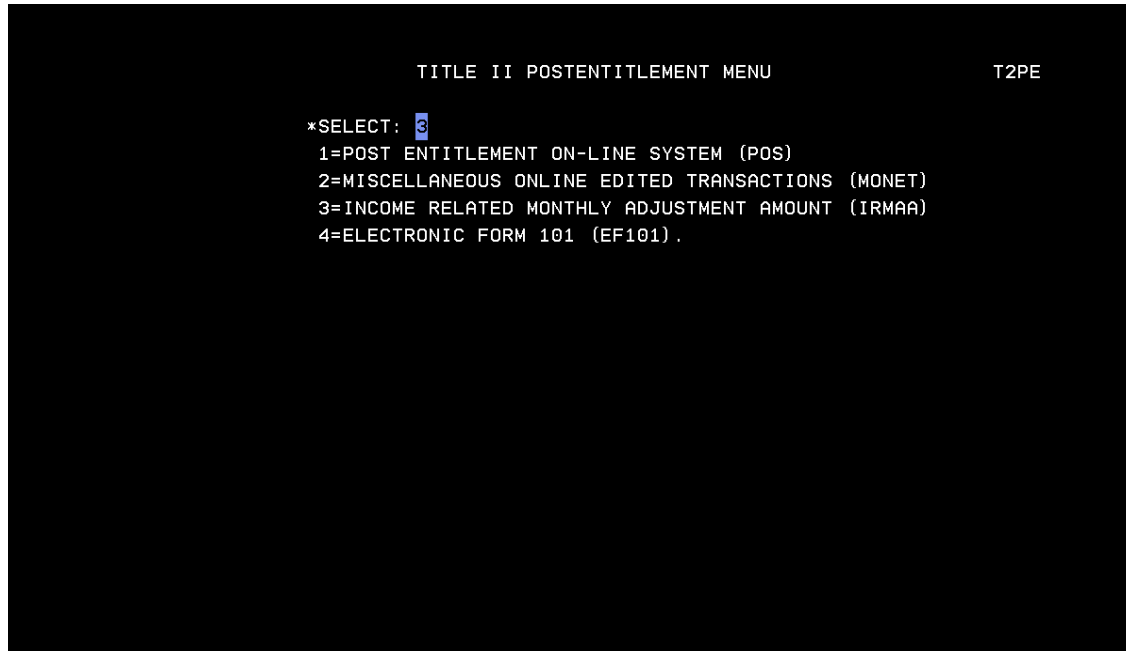
IRSU

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.

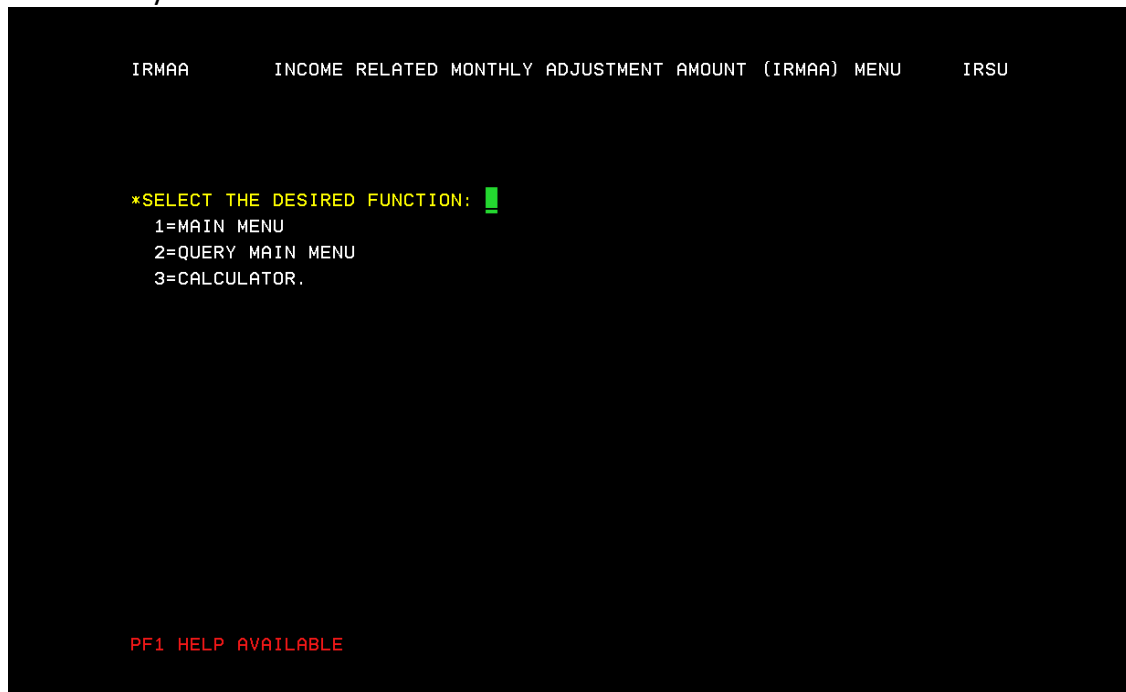
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu



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

```
SELECT THE DESIRED FUNCTION:          LAST UPDATED: 08/2010

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
```

Part D Premium data added to Page 2 of 2

```
NO GOOD CAUSE

      3. CALCULATOR - SELECTING "CALCULATOR" WILL ALLOW THE USER TO
      COMPUTE THE IRMAA AMOUNT.
REMEMBER, IRMAA IS ONLY ONE PORTION OF THE MEDICARE 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.

THE PART D PREMIUM CONSISTS OF:
      O THE PREMIUM, PLUS
      O SURCHARGES, PLUS
      O IRMAA, MINUS
      O ANY LOW INCOME SUBSIDY AMOUNT

REFERENCES: PUMS AT 01101.001.B, MSOM T2PE 008.002

                                           PAGE 2 OF 2
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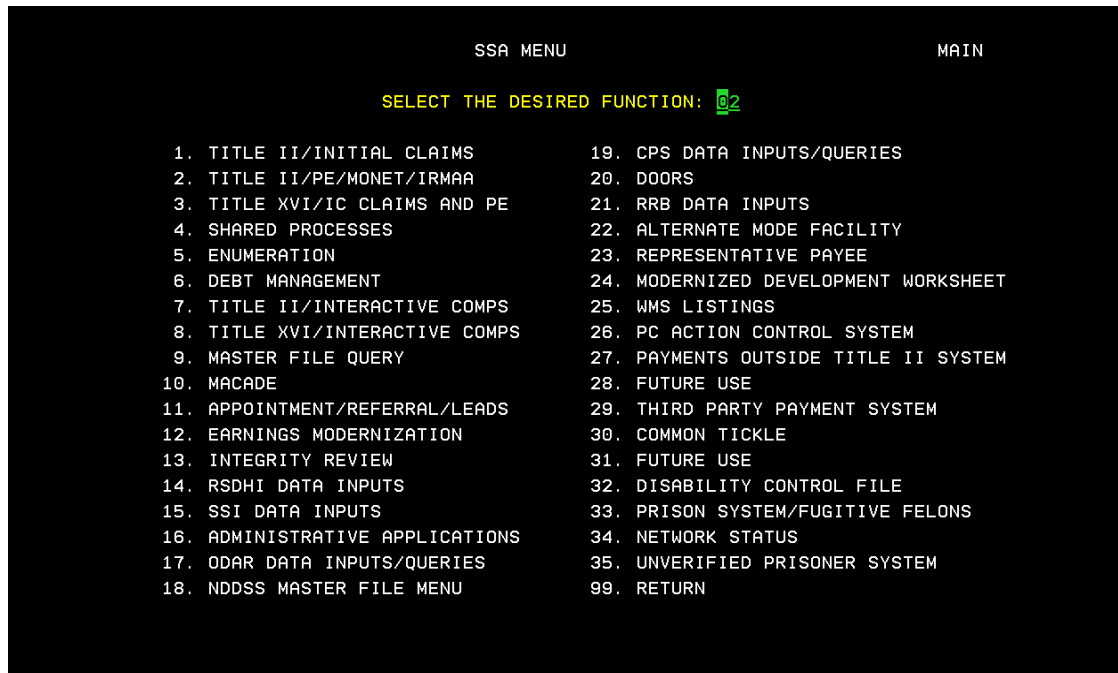
IRCA

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.

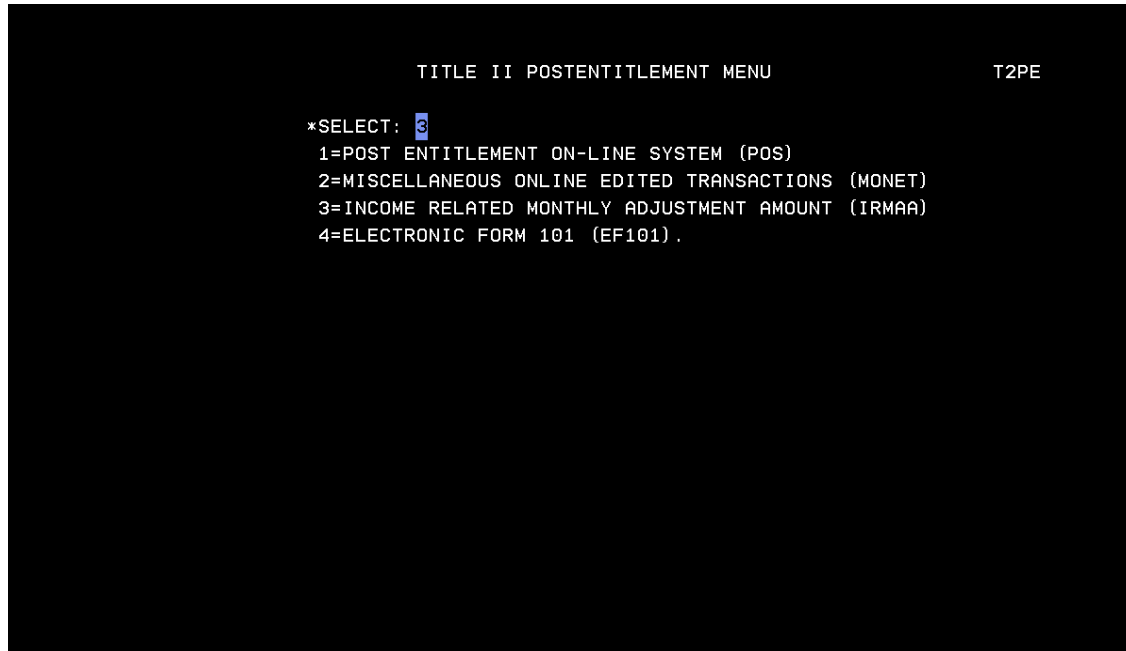
Test Scenario: Beneficiary reports a single filing status for Premium Year 2011. The adjusted gross income is projected as \$500,000.00 with tax-exempt interest equal to \$65,000.00.

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.

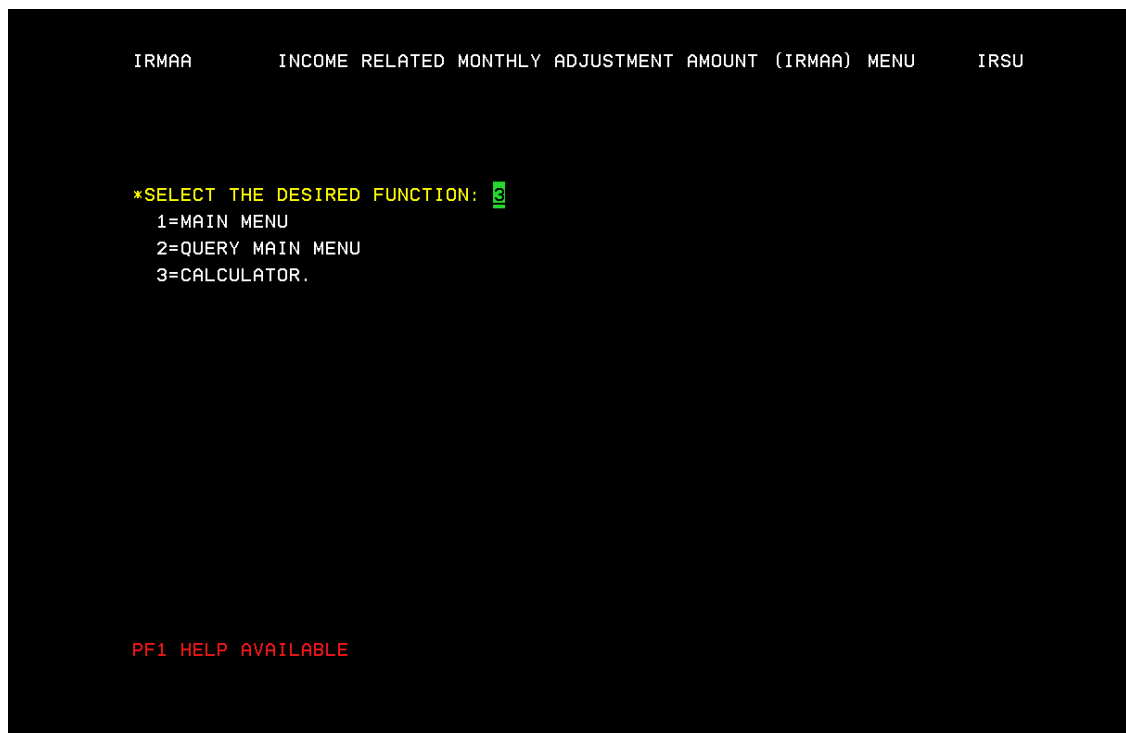
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu



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.

```
IRMAA          INCOME RELATED MONTHLY ADJUSTMENT AMOUNT CALCULATOR          IRCA

                                BENEFICIARY TAX DATA

*SELECT FILING STATUS: 1
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): 2011

ADJUSTED GROSS INCOME: 500000.00          TAX EXEMPT INTEREST: 65000.00

                                CALCULATOR RESULTS

FILING STATUS: _____  PREMIUM YEAR (CCYY): _____  MAGI: _____

MODIFIED ADJUSTED GROSS INCOME RANGE _____ TO _____

IRMAA LEVEL: _  PART B AMOUNT: _____  PART D AMOUNT: _____

PF1 HELP AVAILABLE
```

Enter

```
IRMAA          INCOME RELATED MONTHLY ADJUSTMENT AMOUNT CALCULATOR          IRCA

                                BENEFICIARY TAX DATA

*SELECT FILING STATUS: 1
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): 2011

ADJUSTED GROSS INCOME: 500000.00          TAX EXEMPT INTEREST: 65000.00

                                CALCULATOR RESULTS

FILING STATUS: SNG      PREMIUM YEAR (CCYY): 2011      MAGI: 565000.00

MODIFIED ADJUSTED GROSS INCOME RANGE 214000.01 TO 9999999999.99

IRMAA LEVEL: 4      PART B AMOUNT: 255.10      PART D AMOUNT: 71.40
```

IRIA

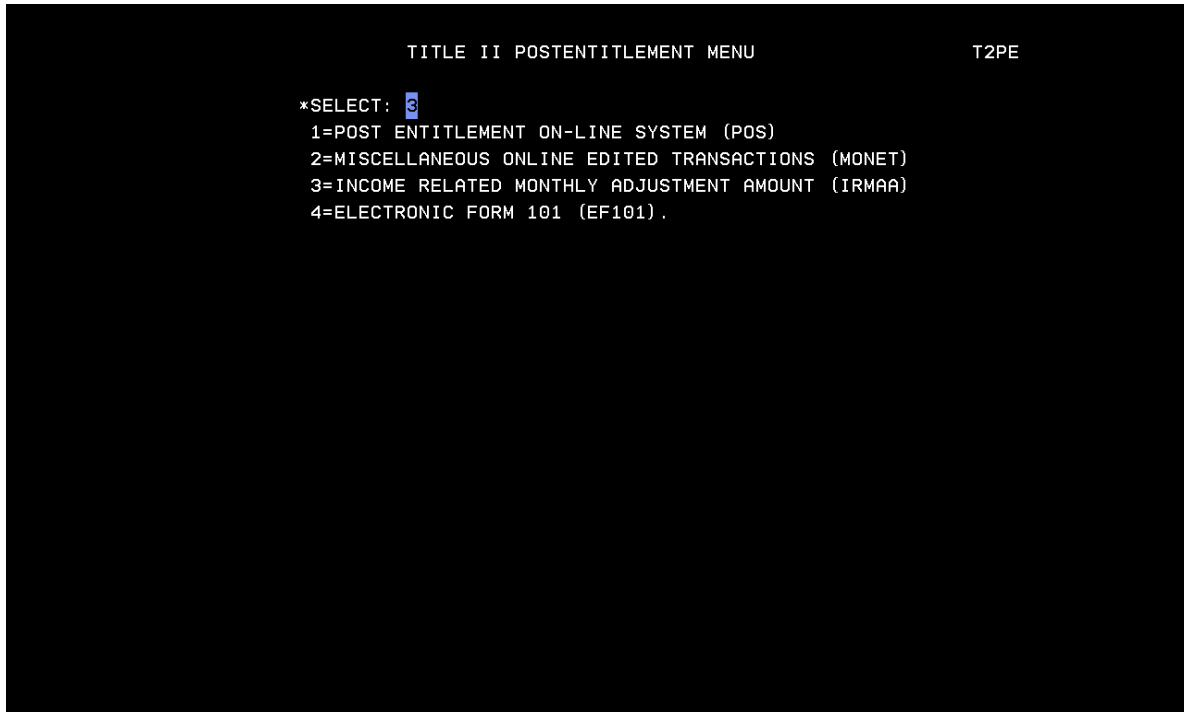
The IRIA is used to manually compute and process a change to the current IRMAA level. Changes include separate IRMAA levels listed for Part B and Part D.

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.

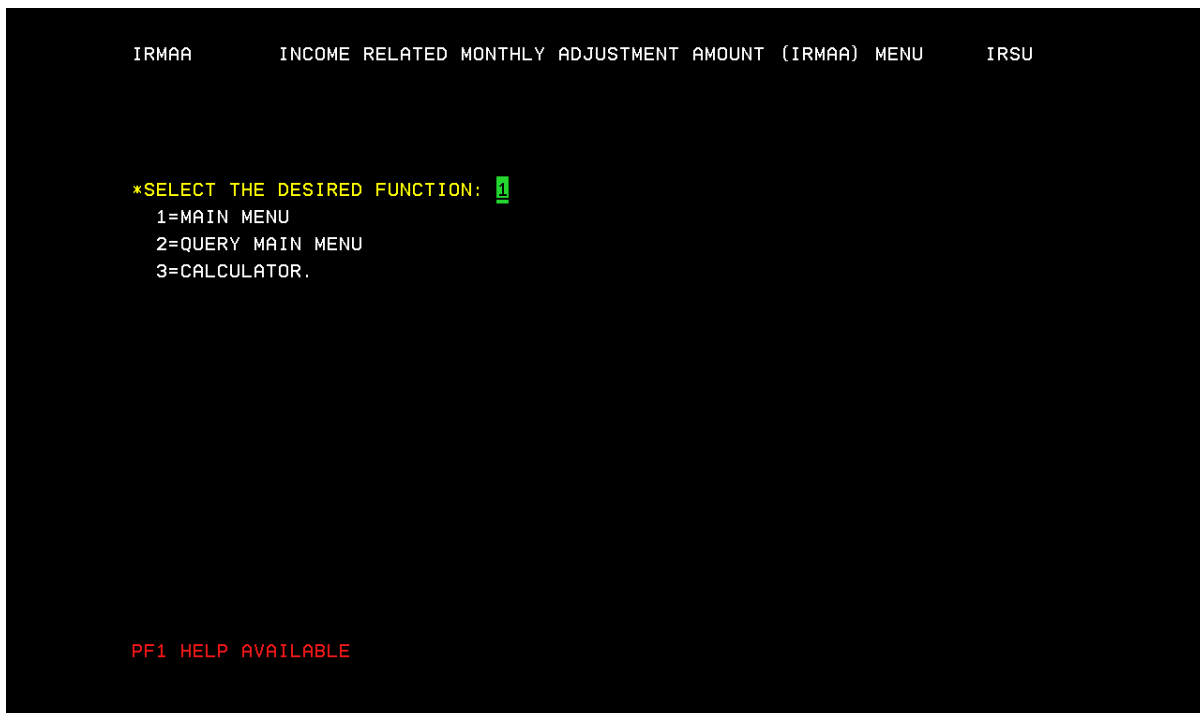
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

```
SSA MENU                                MAIN
SELECT THE DESIRED FUNCTION: 02
1. TITLE II/INITIAL CLAIMS              19. CPS DATA INPUTS/QUERIES
2. TITLE II/PE/MONET/IRMAA              20. DOORS
3. TITLE XVI/IC CLAIMS AND PE           21. RRB DATA INPUTS
4. SHARED PROCESSES                     22. ALTERNATE MODE FACILITY
5. ENUMERATION                           23. REPRESENTATIVE PAYEE
6. DEBT MANAGEMENT                       24. MODERNIZED DEVELOPMENT WORKSHEET
7. TITLE II/INTERACTIVE COMPS           25. WMS LISTINGS
8. TITLE XVI/INTERACTIVE COMPS          26. PC ACTION CONTROL SYSTEM
9. MASTER FILE QUERY                     27. PAYMENTS OUTSIDE TITLE II SYSTEM
10. MACADE                               28. FUTURE USE
11. APPOINTMENT/REFERRAL/LEADS          29. THIRD PARTY PAYMENT SYSTEM
12. EARNINGS MODERNIZATION              30. COMMON TICKLE
13. INTEGRITY REVIEW                     31. FUTURE USE
14. RSDHI DATA INPUTS                   32. DISABILITY CONTROL FILE
15. SSI DATA INPUTS                     33. PRISON SYSTEM/FUGITIVE FELONS
16. ADMINISTRATIVE APPLICATIONS          34. NETWORK STATUS
17. ODAR DATA INPUTS/QUERIES            35. UNVERIFIED PRISONER SYSTEM
18. NDDSS MASTER FILE MENU              99. RETURN
MB b                                     03/053
Connected to Host using LU V21A9320.     \\s27ADF4\4E21-LexC782 on Ne10:
```

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

```
IRMAA    INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MAIN MENU    IRMN
FIELD OFFICE: 014                                           *UNIT: CKEN

*BENEFICIARY SSN: 099822202

*SELECT THE DESIRED OPTION: 1 1=ESTABLISH 2=UPDATE 3=QUERY.
IF OPTION 1 SELECTED, INPUT PREMIUM YEAR (CCYY): 2011

*SELECT THE DESIRED FUNCTION: 3
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): N

PF1 HELP AVAILABLE
```

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.)

```
IRMAA                MANUAL IRMAA ADJUSTMENT                IRIA
SSN: 099822202      NAME: BRIAN                P SPOONER                DOB: 12021960
CURRENT IRMAA DATA
PREMIUM YEAR: 2011  TAX YEAR: 2009  FILING STATUS: MARRIED FILING JOINTLY
AGI: 100000.01  TEI: 80000.00  IRMAA B: 55.20  IRMAA D: 12.40

MANUAL IRMAA INPUT
*BENEFICIARY REPORT DATE (MMDDCCYY): 09142010                TAX YEAR (CCYY): 2011
ADJUSTED GROSS INCOME: 450000.00                TAX EXEMPT INTEREST: 50000.00
SELECT FILING STATUS: 1
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: 2011
SELECT IRMAA LEVEL: 4
0=NO IRMAA  1=LEVEL ONE  2=LEVEL TWO  3=LEVEL THREE  4=LEVEL FOUR.
IRMAA B LVL 1 = 55.20  LVL 2 = 120.50  LVL 3 = 186.80  LVL 4 = 255.10
IRMAA D LVL 1 = 12.40  LVL 2 = 32.10  LVL 3 = 51.80  LVL 4 = 71.40

*REMARKS: Test Case
PF1 HELP AVAILABLE
```

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.

```
IRMAA          INCOME RELATED MONTHLY ADJUSTMENT AMOUNT RESULTS          IRRE
SSN: 099822202  NAME: BRIAN          P SPOONER          DOB: 12021960
                CURRENT IRMAA DATA
PREMIUM YEAR: 2011  TAX YEAR: 2009  FILING STATUS: MARRIED FILING JOINTLY
AGI: 100000.01  TEI: 80000.00  IRMAA B: 55.20  IRMAA D: 12.40
                RECALCULATED IRMAA DATA
PREMIUM YEAR: 2011  TAX YEAR: 2011  FILING STATUS: SINGLE
AGI: 450000.00  TEI: 50000.00  IRMAA B: 255.10  IRMAA D: 71.40

NEW DETERMINATION RESULTS:  IRMAA INCREASE BASED ON MANUAL ENTRY

*PROCESS ALL TRANSACTIONS (Y/N): y

PF1 HELP AVAILABLE

MORE (Y/N): N
```

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.

```
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
```

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.

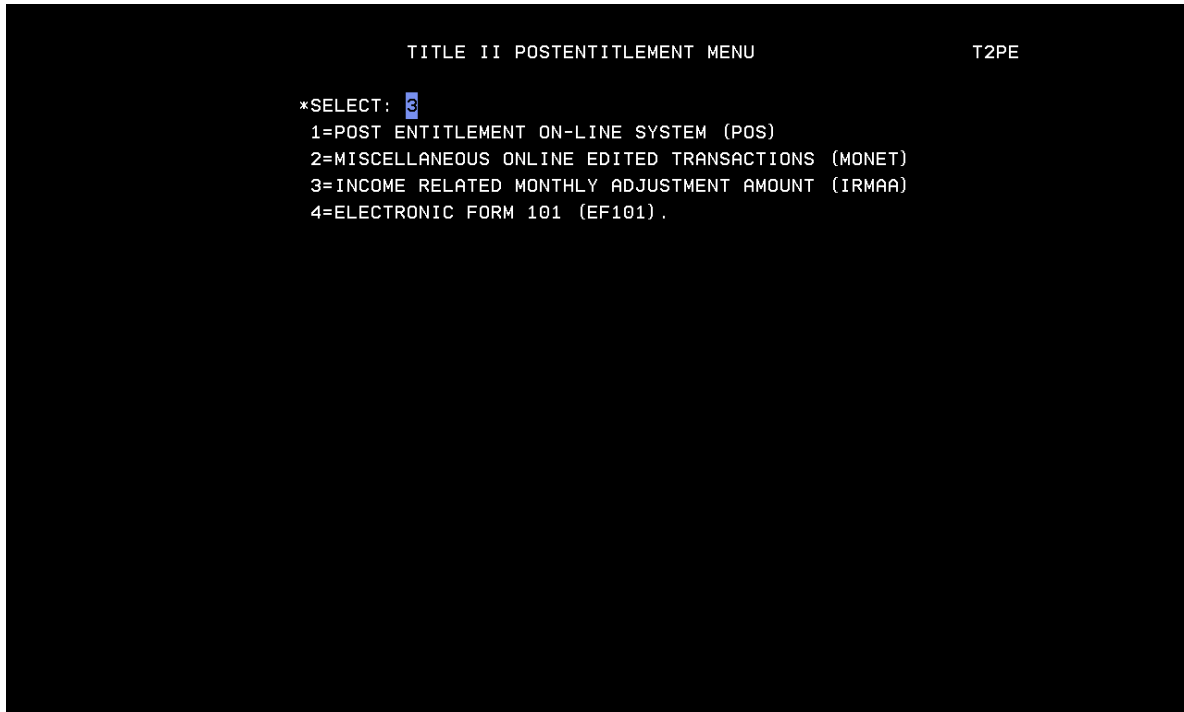
Test Scenario: NH is currently charged Level 3 IRMAA. He reports LCE for the 2010 tax year, 2011 Premium year. NH married and provided estimated tax data. NH's AGI is \$600,000.00 with a TEI of \$40,000.00. Filing status is married filing separately.

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

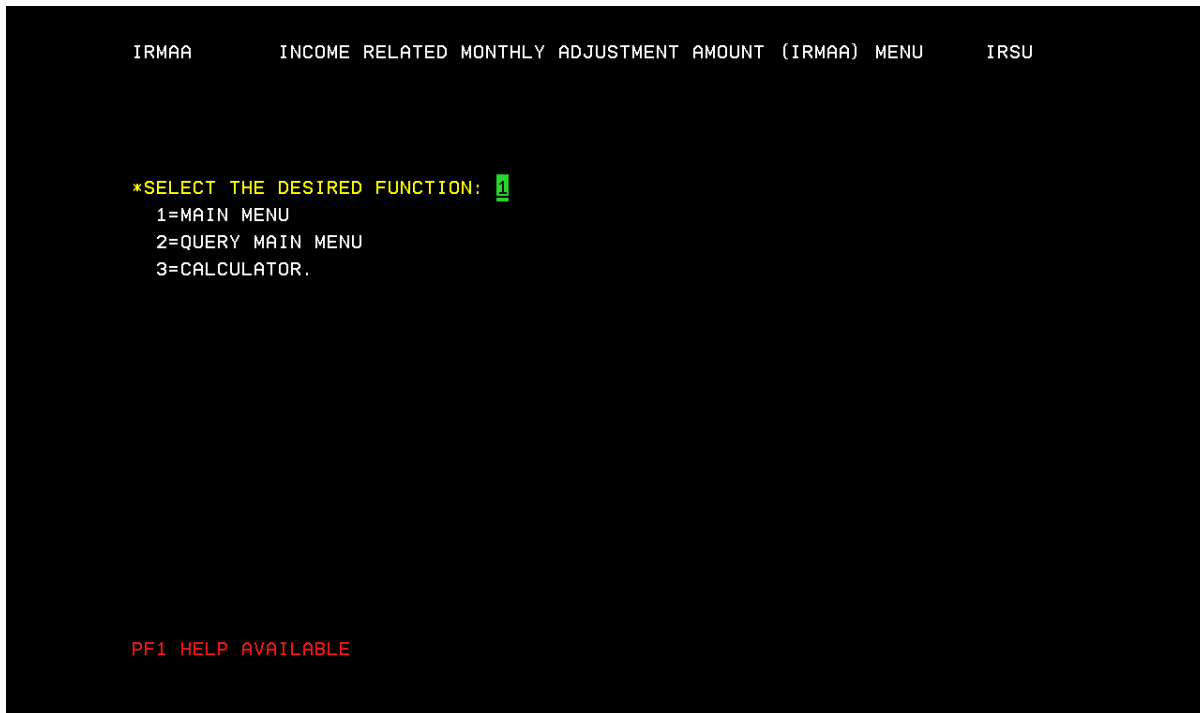
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

```
SSA MENU                                MAIN
SELECT THE DESIRED FUNCTION: 02
1. TITLE II/INITIAL CLAIMS              19. CPS DATA INPUTS/QUERIES
2. TITLE II/PE/MONET/IRMAA              20. DOORS
3. TITLE XVI/IC CLAIMS AND PE            21. RRB DATA INPUTS
4. SHARED PROCESSES                      22. ALTERNATE MODE FACILITY
5. ENUMERATION                           23. REPRESENTATIVE PAYEE
6. DEBT MANAGEMENT                       24. MODERNIZED DEVELOPMENT WORKSHEET
7. TITLE II/INTERACTIVE COMPS            25. WMS LISTINGS
8. TITLE XVI/INTERACTIVE COMPS           26. PC ACTION CONTROL SYSTEM
9. MASTER FILE QUERY                     27. PAYMENTS OUTSIDE TITLE II SYSTEM
10. MACADE                                28. FUTURE USE
11. APPOINTMENT/REFERRAL/LEADS            29. THIRD PARTY PAYMENT SYSTEM
12. EARNINGS MODERNIZATION                30. COMMON TICKLE
13. INTEGRITY REVIEW                       31. FUTURE USE
14. RSDHI DATA INPUTS                    32. DISABILITY CONTROL FILE
15. SSI DATA INPUTS                      33. PRISON SYSTEM/FUGITIVE FELONS
16. ADMINISTRATIVE APPLICATIONS           34. NETWORK STATUS
17. ODAR DATA INPUTS/QUERIES             35. UNVERIFIED PRISONER SYSTEM
18. NDDSS MASTER FILE MENU                99. RETURN
MB b                                       03/053
Connected to Host using LU V21A9320 .     \\s27ADF4\4E21-LexC782 on Ne10:
```

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.

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

*BENEFICIARY SSN: 087282400

*SELECT THE DESIRED OPTION: 1 1=ESTABLISH 2=UPDATE 3=QUERY.
  IF OPTION 1 SELECTED, INPUT PREMIUM YEAR (CCYY): 2011

*SELECT THE DESIRED FUNCTION: 1
  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): 2010

*APPEAL INVOLVED (Y/N): N

PF1 HELP AVAILABLE
```

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

```
IRMAA                                LIFE CHANGING EVENT                                IRLC
SSN: 087282400  NAME: EDWARD                E MAGNUSON                                DOB: 12021925

*SELECT LIFE CHANGING EVENT: 2
  1=DEATH OF SPOUSE                    5=WORK STOPPED
  2=MARRIAGE/REARRIAGE                  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): 092010

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

REMARKS: TEST

PF SUPPORT FOR THAT KEY NOT AVAILABLE
```

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

```
IRMAA                ATTESTATION OF PENALTY OF PERJURY                IRPP
SSN: 087282400      NAME: EDWARD                E MAGNUSON                DOB: 12021925

I UNDERSTAND THAT BY SUBMITTING THIS EVIDENCE I AM DECLARING UNDER PENALTY
OF PERJURY THAT ALL THE INFORMATION PROVIDED IS TRUE AND CORRECT
TO THE BEST OF MY KNOWLEDGE. I UNDERSTAND THAT ANYONE WHO KNOWINGLY GIVES A
FALSE OR MISLEADING STATEMENT ABOUT A MATERIAL FACT OR CAUSES SOMEONE ELSE TO
DO SO, COMMITS A CRIME AND MAY BE SENT TO PRISON, OR MAY FACE OTHER PENALTIES,
OR BOTH.

*I ATTEST THAT ALL INFORMATION PROVIDED IS CORRECT (Y/N): Y

*REPRESENTATIVE PAYEE ATTESTED (Y/N): Y

PF1 HELP AVAILABLE
```

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

```
IRMAA                TAX INFORMATION                IRMA
SSN: 087282400      NAME: EDWARD                E MAGNUSON                DOB: 12021925
PREMIUM YEAR: 2011                TAX YEAR: 2010

*BENEFICIARY REPORT DATE (MMDDCCYY): 09172010
ADJUSTED GROSS INCOME: 600000.00                TAX EXEMPT INTEREST: 40000.00

SELECT TYPE: 3
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: 3
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    1=PROVEN    2=NOT PROVEN    3=PENDING.                GOOD CAUSE (Y/N): _
REMARKS: _____

PF1 HELP AVAILABLE
```

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

```
IRMAA          INCOME RELATED MONTHLY ADJUSTMENT AMOUNT RESULTS          IRRE
SSN: 087282400  NAME: EDWARD          E MAGNUSON          DOB: 12021925
                CURRENT IRMAA DATA
PREMIUM YEAR: 2011  TAX YEAR: 2009  FILING STATUS: MARRIED FILING JOINTLY
AGI: 400000.00  TEI: 20000.00  IRMAA B: 186.80  IRMAA D: 51.80
                RECALCULATED IRMAA DATA
PREMIUM YEAR: 2011  TAX YEAR: 2009  FILING STATUS: MARRIED FILING JOINTLY
AGI: 400000.00  TEI: 20000.00  IRMAA B: 186.80  IRMAA D: 51.80

NEW DETERMINATION RESULTS: NO CHANGE

NEW DETERMINATION RESULTS:

*PROCESS ALL TRANSACTIONS (Y/N): Y
MORE (Y/N): N
PF1 HELP AVAILABLE
```

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

```
IRMAA          INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MAIN MENU  IRMN
FIELD OFFICE:          *UNIT: Y
*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 DISMISSED SUCCESSFULLY - PRESS ANY PF KEY TO ENTER EVID
```


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): █

PF1 HELP AVAILABLE

MORE (Y/N): N
```

```
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
```

Reference:

IRSU

```
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:
          0 ESTABLISH INPUT
          0 UPDATE INPUT
            - PENDING LIFE CHANGING EVENT (LCE) - (IRLP)
            - PENDING TAX INFORMATION (IRTP)
          0 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:
          0 IRMAA PREMIUM YEAR QUERY
          0 PREMIUM YEAR: QUERY, EVENT HISTORY, DISMISSALS
          0 DISMISSALS FOR NON-QUALIFYING EVENTS, NO PROOF,

                                           PAGE 1 OF 2
```

```
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:
          0 THE STANDARD PREMIUM, PLUS
          0 SURCHARGES, PLUS
          0 IRMAA, MINUS
          0 MEDICARE ADVANTAGE REDUCTION IN PREMIUM CREDITED, IF ANY.

      REFERENCES: POMS HI 01101.001.B, MSOM T2PE 008.002
```

PAGE 2 OF 2

IRCA

```
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
```

IRIA

```
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): █1062006 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
```

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): 

                                                                    MORE (Y/N): N

PF1 HELP AVAILABLE
```