IRMAA Online Screens: 0960-0784 January 2017
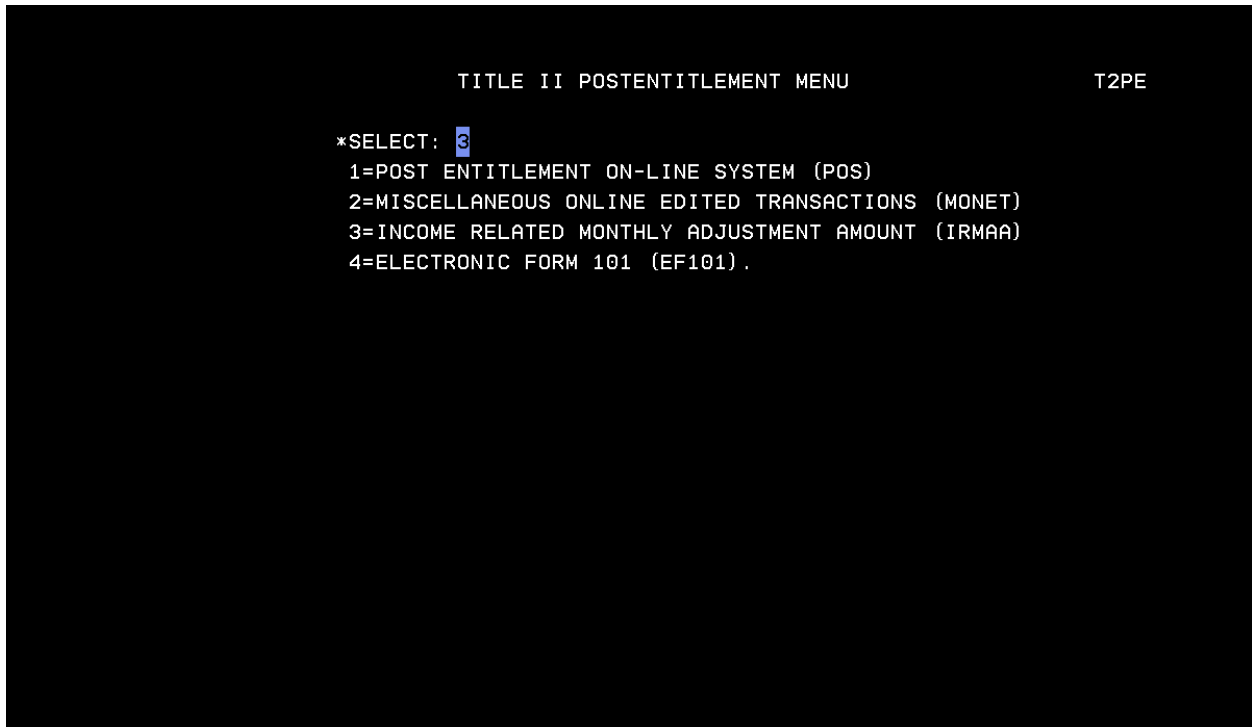
IRSU

The IRSU screen displays the INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) menu.

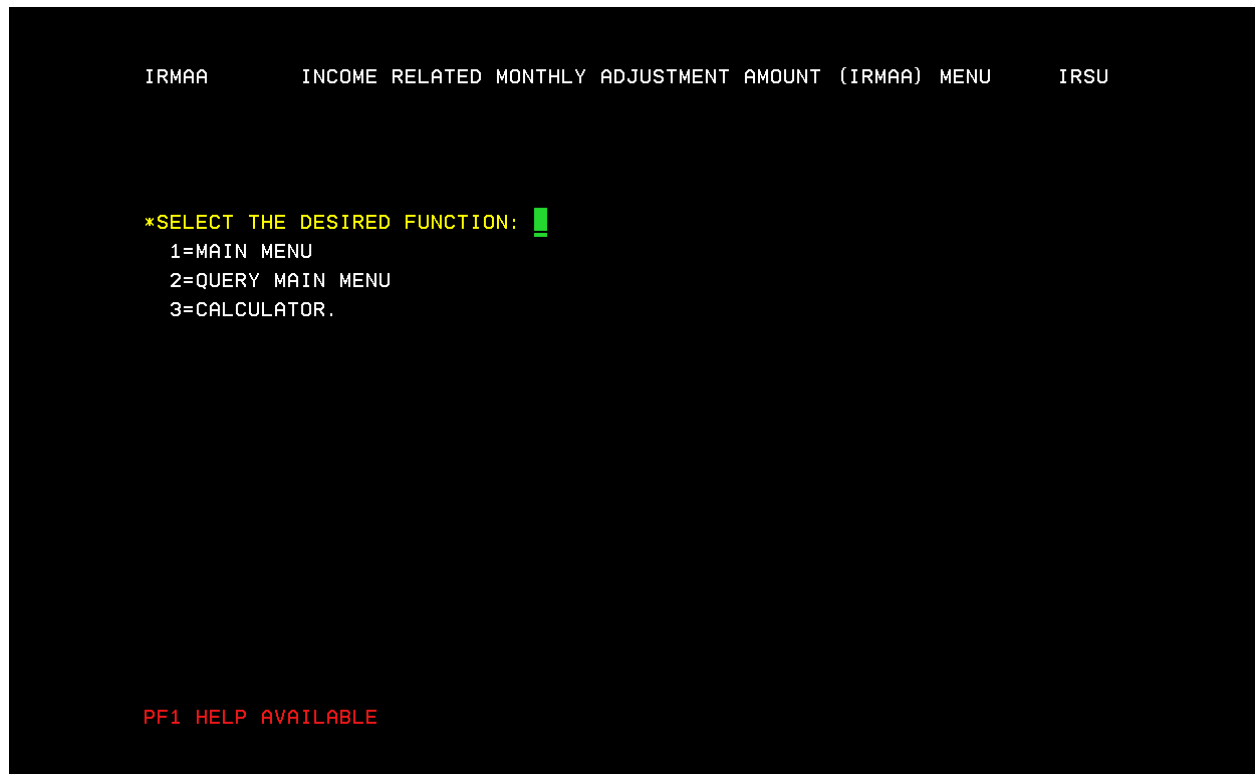Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

```
                              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
```

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

```
                              TITLE II POSTENTITLEMENT MENU                 T2PE

              *SELECT: 3
               1=POST ENTITLEMENT ON-LINE SYSTEM (POS)
               2=MISCELLANEOUS ONLINE EDITED TRANSACTIONS (MONET)
               3=INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA)
               4=ELECTRONIC FORM 101 (EF101).
```

Select F1 Key to access the HELP screen

```
       IRMAA         INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MENU      IRSU




       *SELECT THE DESIRED FUNCTION: █
         1=MAIN MENU
         2=QUERY MAIN MENU
         3=CALCULATOR.












       PF1 HELP AVAILABLE
```

Select 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
```
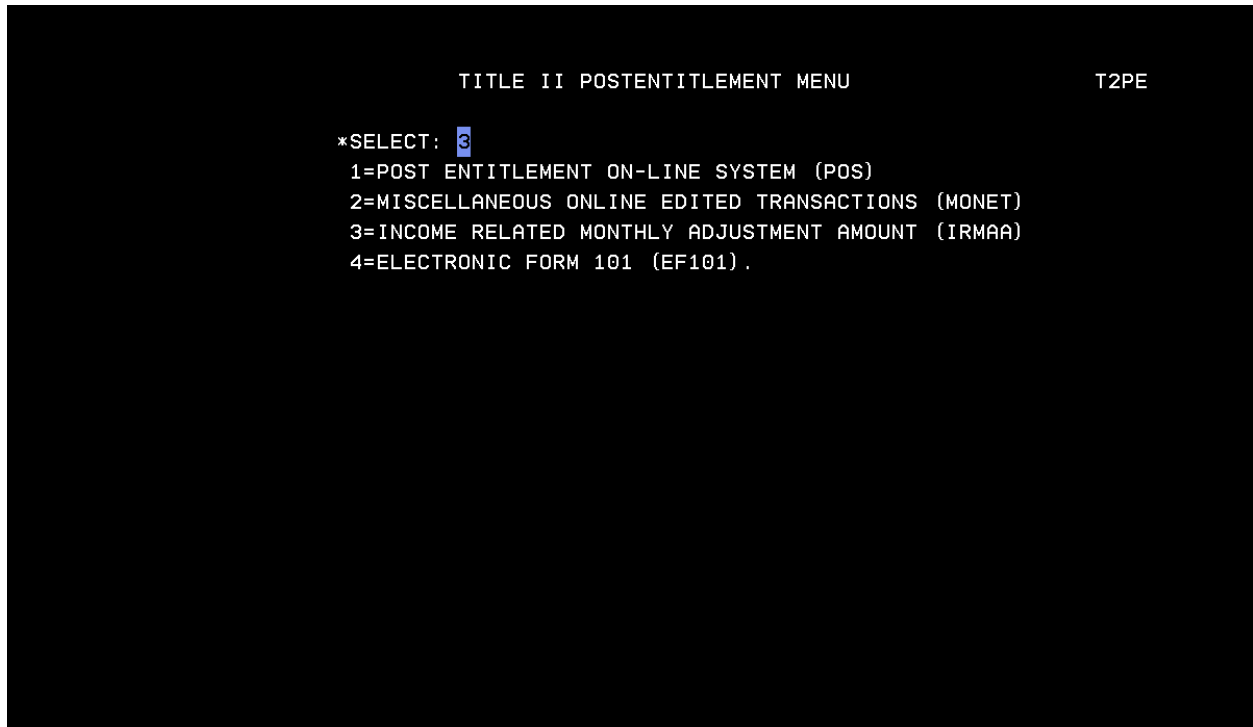
IRCA

The IRCA screen is an online IRMAA calculator used to determine an individual's IRMAA level, and associated cost.

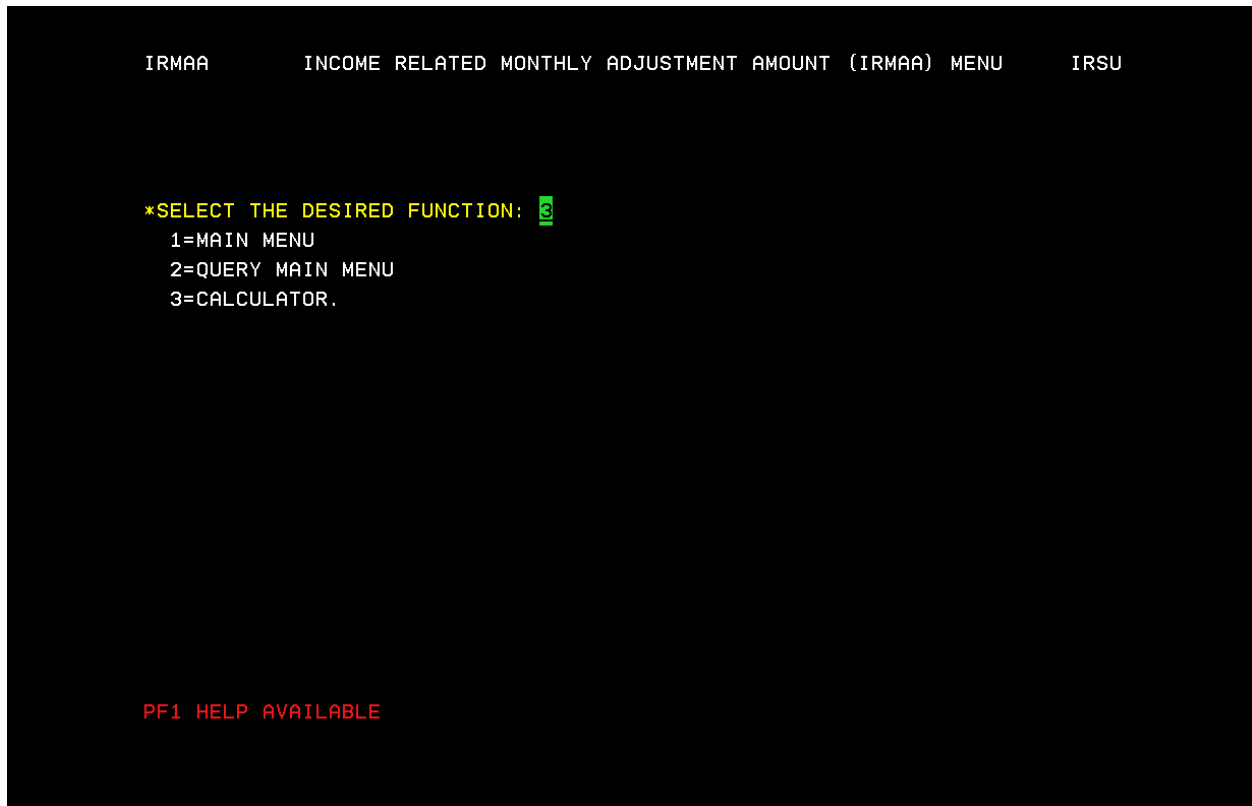Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

```
                              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
```

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

```
                        TITLE II POSTENTITLEMENT MENU                T2PE


        *SELECT: 3
         1=POST ENTITLEMENT ON-LINE SYSTEM (POS)
         2=MISCELLANEOUS ONLINE EDITED TRANSACTIONS (MONET)
         3=INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA)
         4=ELECTRONIC FORM 101 (EF101).
```

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

```
        IRMAA        INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MENU      IRSU




        *SELECT THE DESIRED FUNCTION: 3
          1=MAIN MENU
          2=QUERY MAIN MENU
          3=CALCULATOR.












        PF1 HELP AVAILABLE
```

Enter Claimant's filing status; Premium Year affected Adjusted Gross Income, and Tax Exempt Interest. Then: Select 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
```

Select 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 99999999999.99

IRMAA LEVEL: 4     PART B AMOUNT: __255.10     PART D AMOUNT: ___71.40
```

IRIA

The IRIA screen is used to manually compute and process a change to the current 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:
```
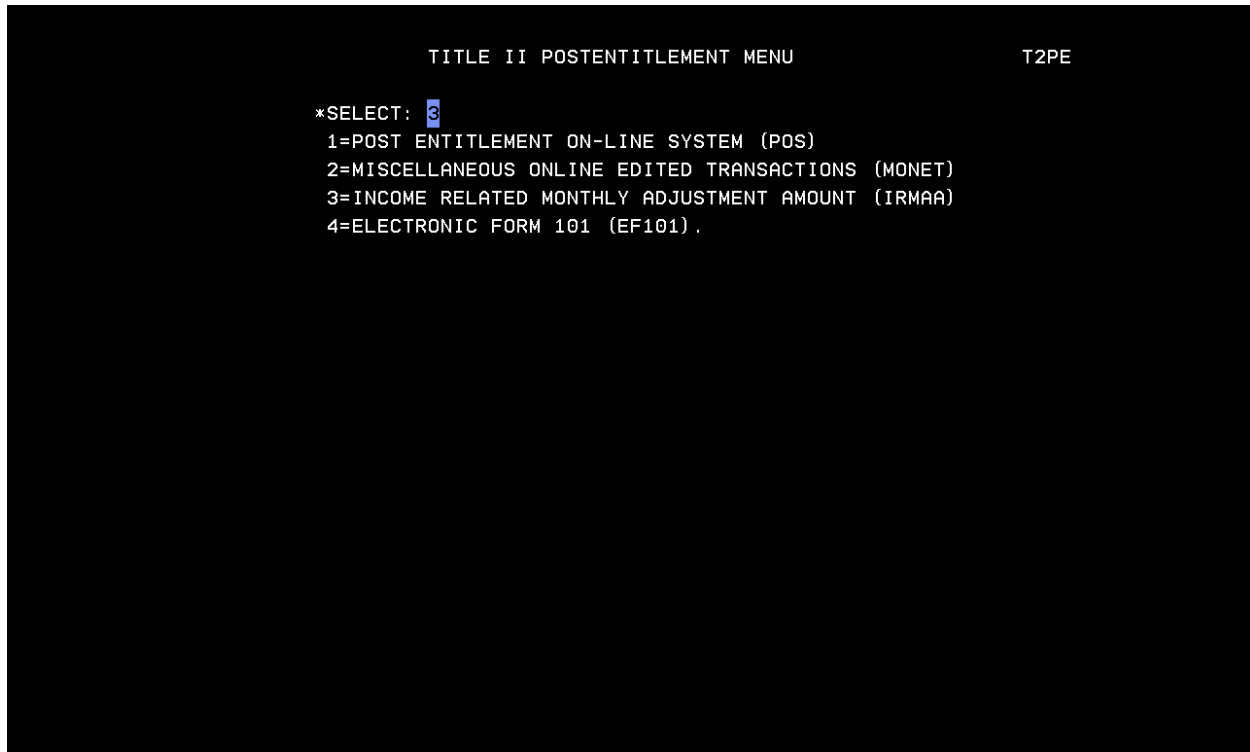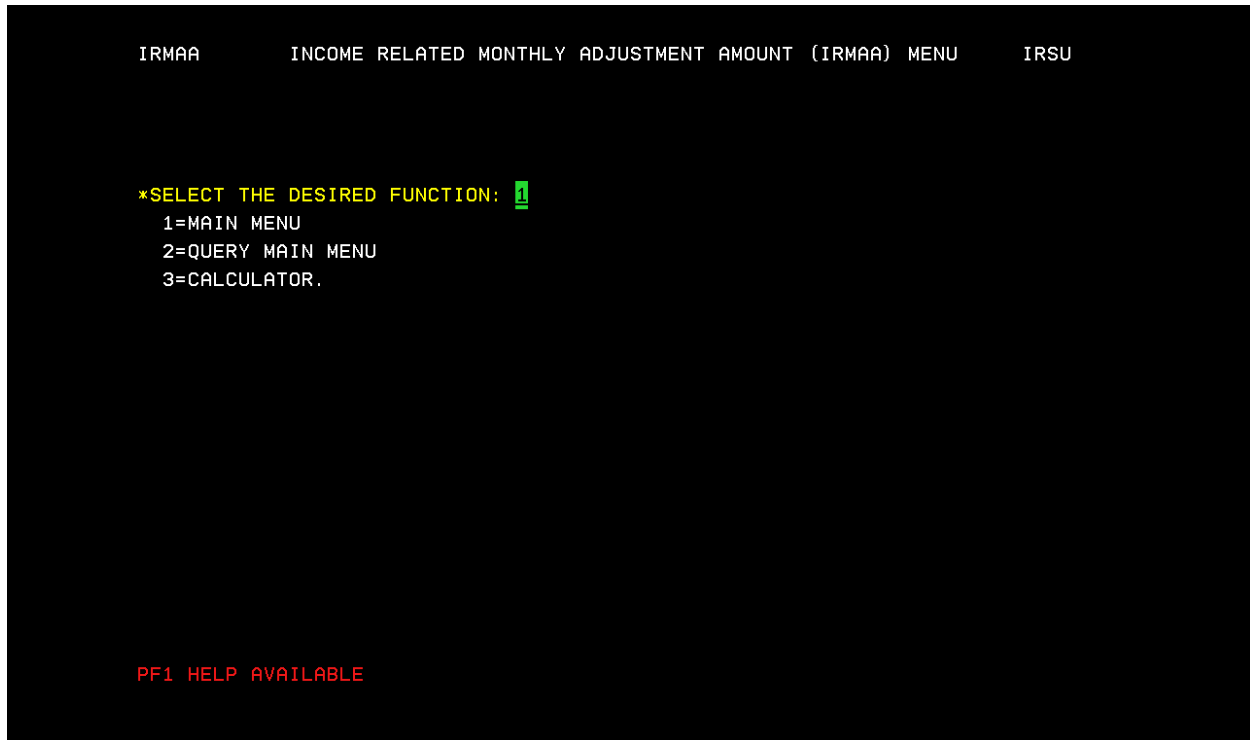
Select 3: INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) from the TITLE II
POSTENTITLEMENT MENU.

```
                      TITLE II POSTENTITLEMENT MENU                T2PE

            *SELECT: 3
             1=POST ENTITLEMENT ON-LINE SYSTEM (POS)
             2=MISCELLANEOUS ONLINE EDITED TRANSACTIONS (MONET)
             3=INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA)
             4=ELECTRONIC FORM 101 (EF101).
```

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

```
     IRMAA        INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MENU      IRSU




        *SELECT THE DESIRED FUNCTION: 1
          1=MAIN MENU
          2=QUERY MAIN MENU
          3=CALCULATOR.













        PF1 HELP AVAILABLE
```

Enter Unit code, Beneficiary SSN, Select 1: ESTABLISH, Premium year affected 3: MANUAL IRMAA ADJUSTMENT, then select Enter

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

*BENEFICIARY SSN:


*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:              NAME:                                 DOB:
                          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 then select Enter.

```
IRMAA          INCOME RELATED MONTHLY ADJUSTMENT AMOUNT RESULTS        IRRE
SSN:              NAME:                                        DOB:
                          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): █

                                                     MORE (Y/N): N

PF1 HELP AVAILABLE
```

Next, is a redirection to the main menu. If the 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.
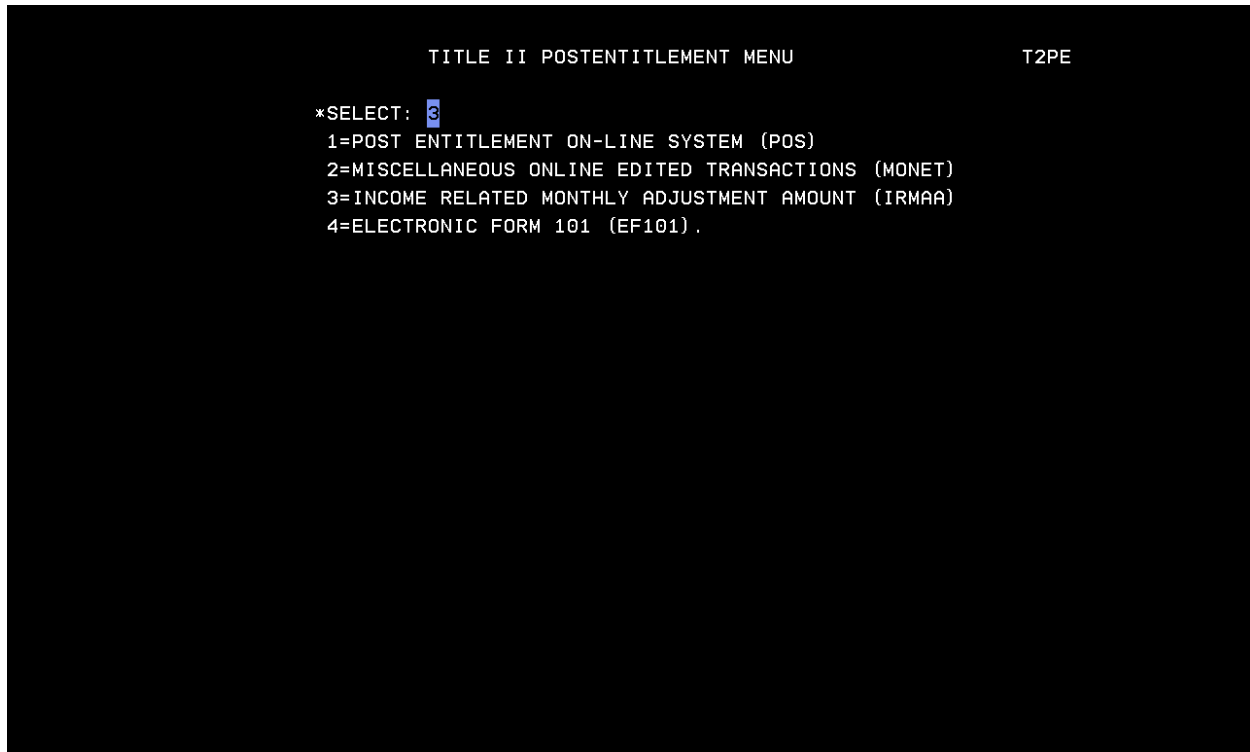
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

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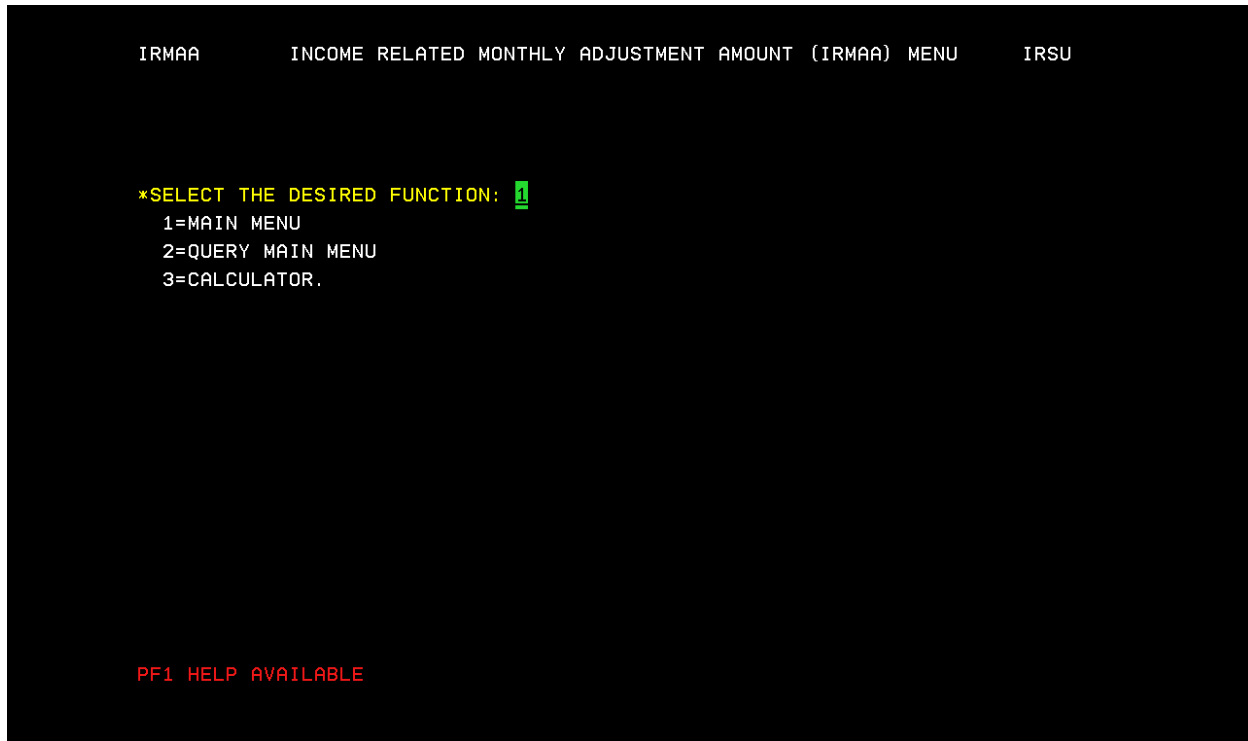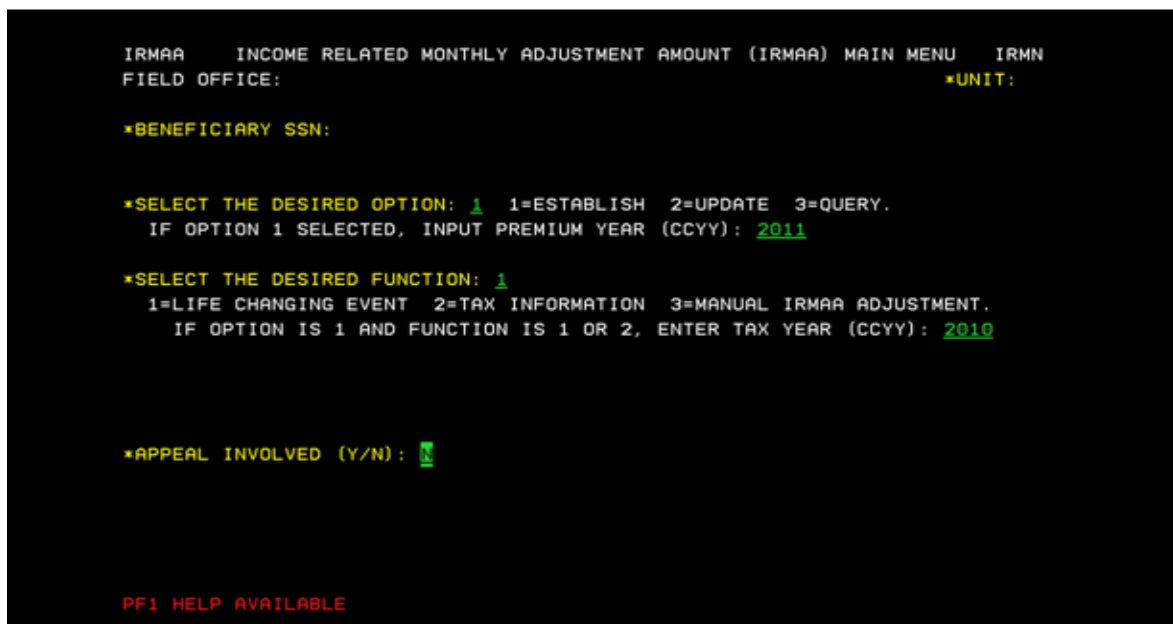
Select 3: INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) from the TITLE II POSTENTITLEMENT MENU.

```
                        TITLE II POSTENTITLEMENT MENU                    T2PE

            *SELECT: 3
             1=POST ENTITLEMENT ON-LINE SYSTEM (POS)
             2=MISCELLANEOUS ONLINE EDITED TRANSACTIONS (MONET)
             3=INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA)
             4=ELECTRONIC FORM 101 (EF101).
```

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

```
   IRMAA        INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MENU      IRSU




     *SELECT THE DESIRED FUNCTION: 1
       1=MAIN MENU
       2=QUERY MAIN MENU
       3=CALCULATOR.
```

```
   PF1 HELP AVAILABLE
```

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:                                                 *UNIT:

   *BENEFICIARY SSN:


   *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:           NAME:                                    DOB:


*SELECT LIFE CHANGING EVENT: 2
  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): 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:           NAME:                                    DOB:


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. Select Enter.

```
IRMAA                        TAX INFORMATION                      IRMA
SSN:              NAME:                                  DOB:
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. Select Enter

```
IRMAA        INCOME RELATED MONTHLY ADJUSTMENT AMOUNT RESULTS      IRRE
SSN:           NAME:                                  DOB:
                          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): █
                                                       MORE (Y/N): N
PF1 HELP AVAILABLE
```

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

```
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 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:            NAME:                                      DOB:
                          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): ▮

                                                        MORE (Y/N): N

PF1 HELP AVAILABLE
```

```
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
```

References:

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:
            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
```

```
            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
```

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:

                    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:

                         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
```