

Justification for Non-Substantive Changes for Form SSA-44
Medicare Income-Related Monthly
Adjustment Amount – Life-Changing Event
20 CFR 418.1205, 418.1255, 418.1265, 418.2205, 418.2255, 418.2265
OMB No. 0960-0784

Background

The Centers for Medicare & Medicaid Services in the Department of Health and Human Services is responsible for determining the amounts of Medicare Part B monthly premiums; the national base beneficiary premium for prescription drug coverage; and the monthly income-related adjustment amounts. SSA is responsible for several aspects of the premium collection process. As part of this process, SSA's role includes:

- 1) Determining which Medicare Part B and prescription drug coverage recipients are subject to Income-Related Monthly Adjustment Amount (IRMAA) based on Federal tax return information from the Internal Revenue Service (IRS);
- 2) Determining when to apply an IRMAA amount;
- 3) Accepting information from recipients that updates or clarifies the tax data IRS provided; and,
- 4) Making new initial IRMAA determinations based on a significant life-changing event (LCE) when there is a reduction in income.

Since SSA determines IRMAA based on past IRS tax data, it is possible recipients' financial situations may change due to a significant LCE, and SSA's IRMAA determination would no longer be accurate. SSA uses Form SSA-44, the Medicare Income-Related Monthly Adjustment Amount – Life-Changing Event, to collect information from Medicare recipients about an LCE that could affect their IRMAA.

Revisions to the Collection Instrument:

- **Change #1:** We updated the years throughout the form as follows:

2015 to 2016
2016 to 2017
2017 to 2018
2018 to 2019
2019 to 2020

Justification #1: We updated the years to reflect up to date information.

- **Change #2:** We updated the modified adjusted gross income, Part-B Monthly Adjustment, and Prescription Drug Coverage Monthly Adjustment amounts on page one.

Justification #2: We updated the IRMAA Rates due to the release of CY2019 amounts.

SSA will implement these changes to the SSA-44 upon OMB approval.

This action does not affect the public reporting burden