

## IRMAA Online Screens: 0960-0784 January 2017

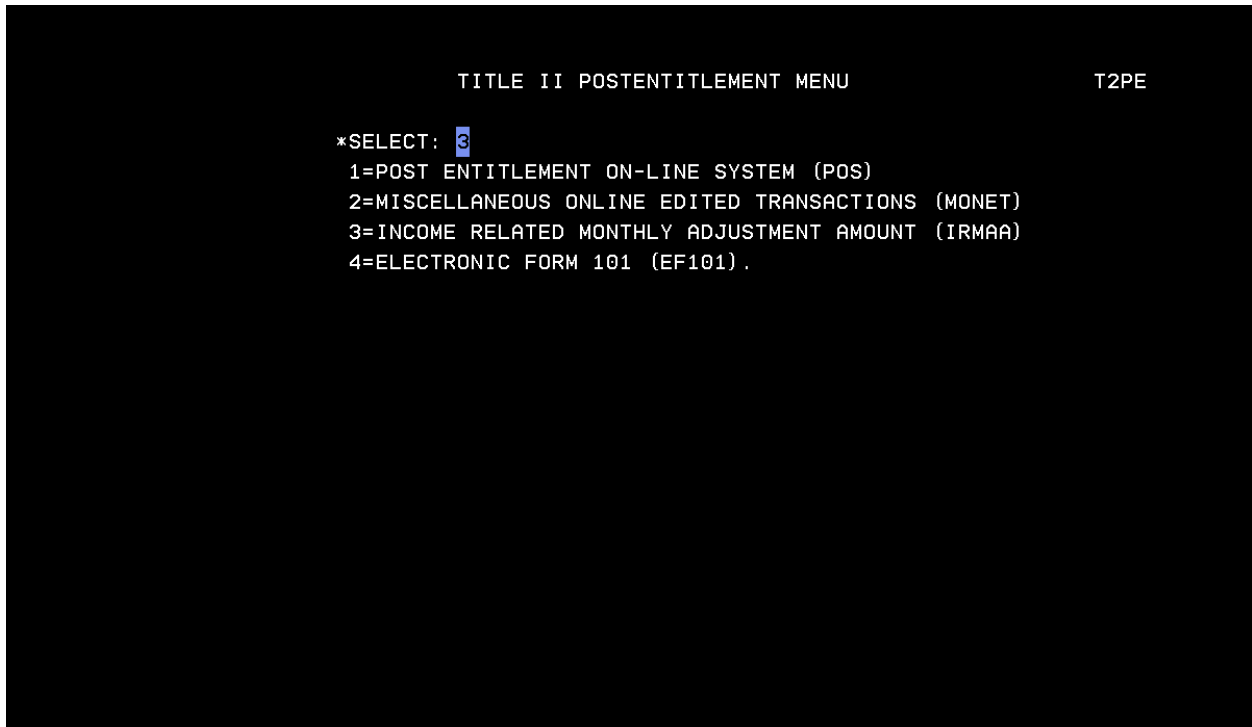
### IRSU

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

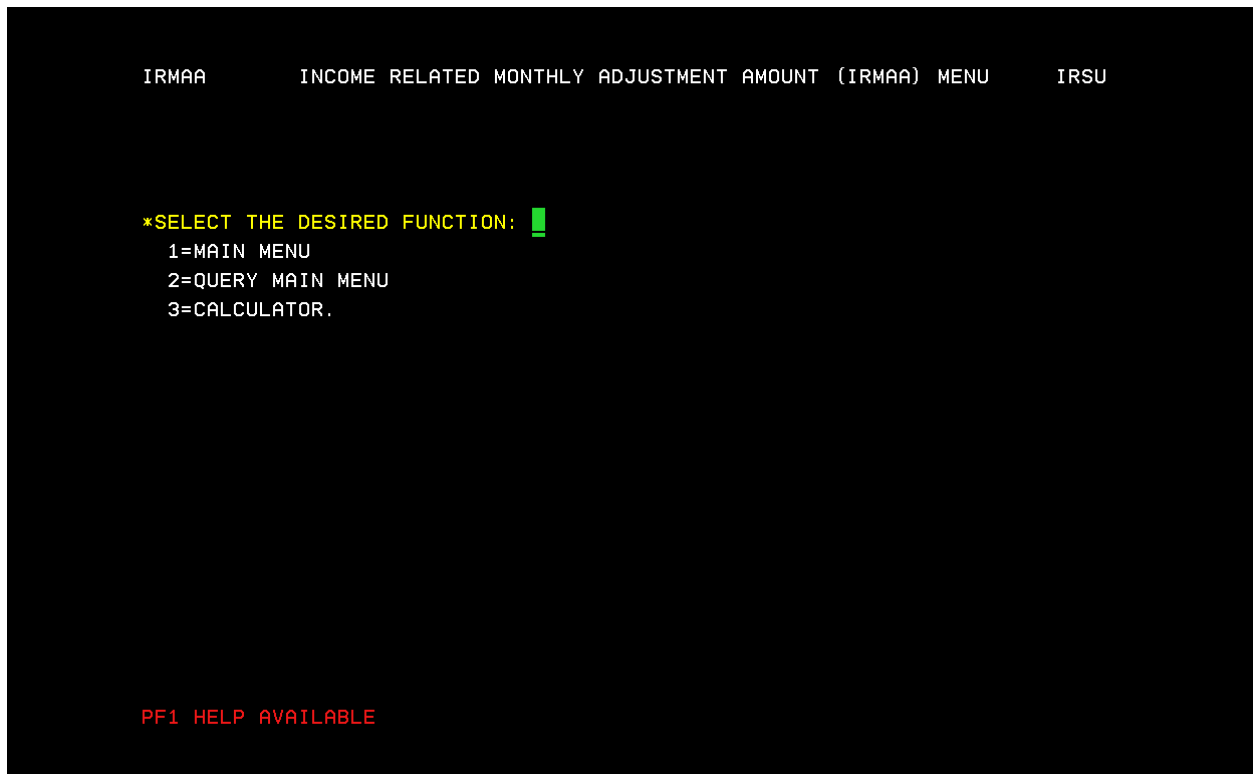
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

```
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:



Select F1 Key to access the HELP screen



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

PAGE 1 OF 2

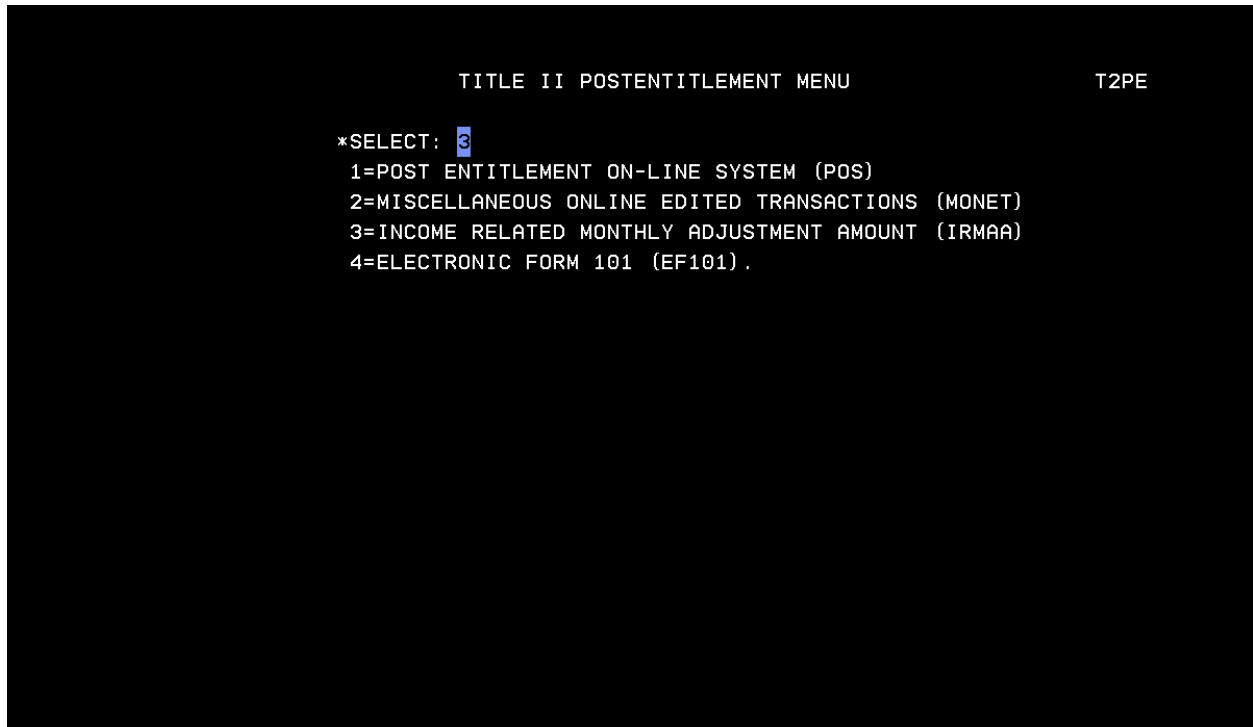
## IRCA

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

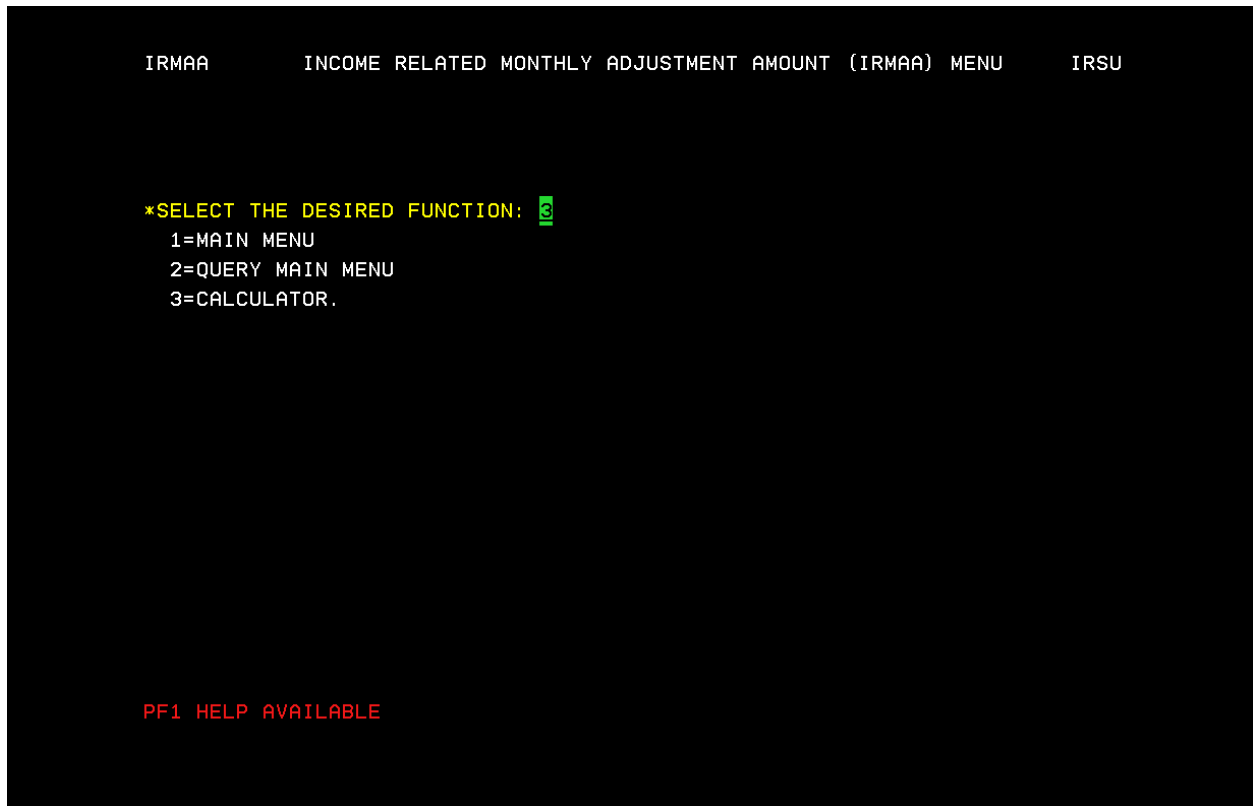
Select 02 (TITLE II/PE/MONET/IRMAA) from the SSA Menu

```
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.



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. 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 9999999999.99

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

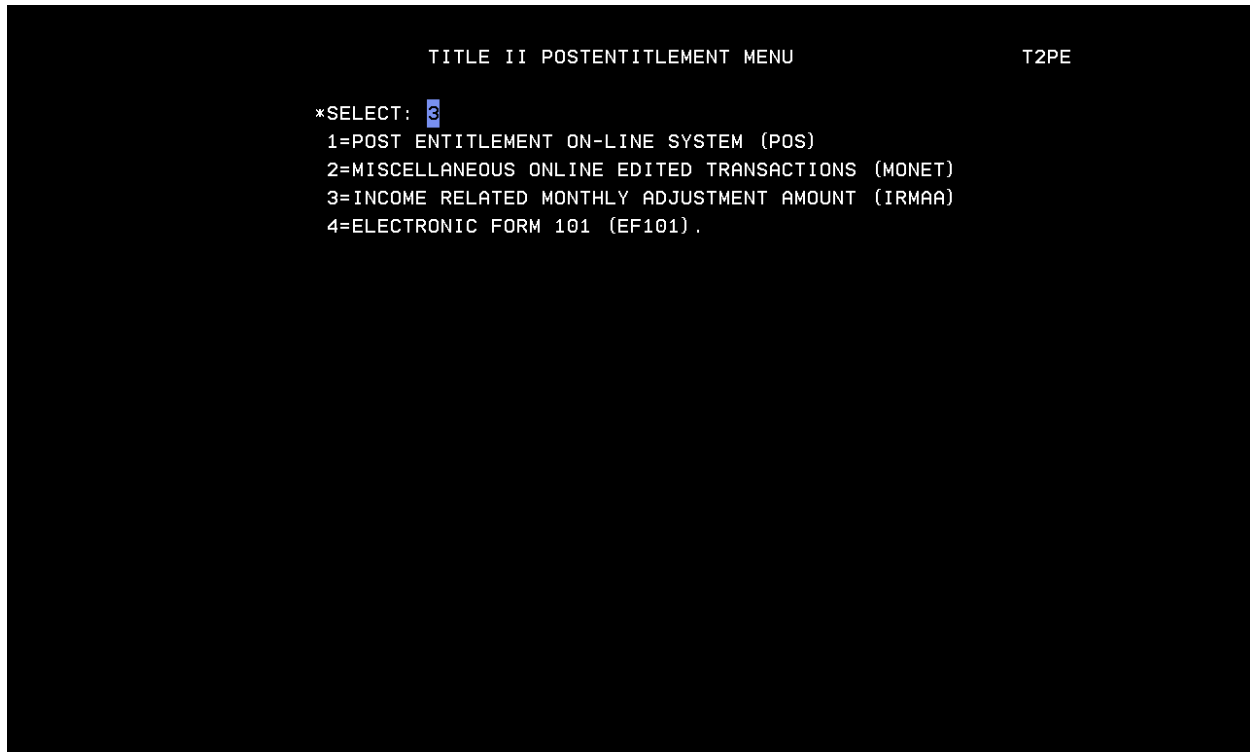
```
SSA MENU                                MAIN

SELECT THE DESIRED FUNCTION: 02

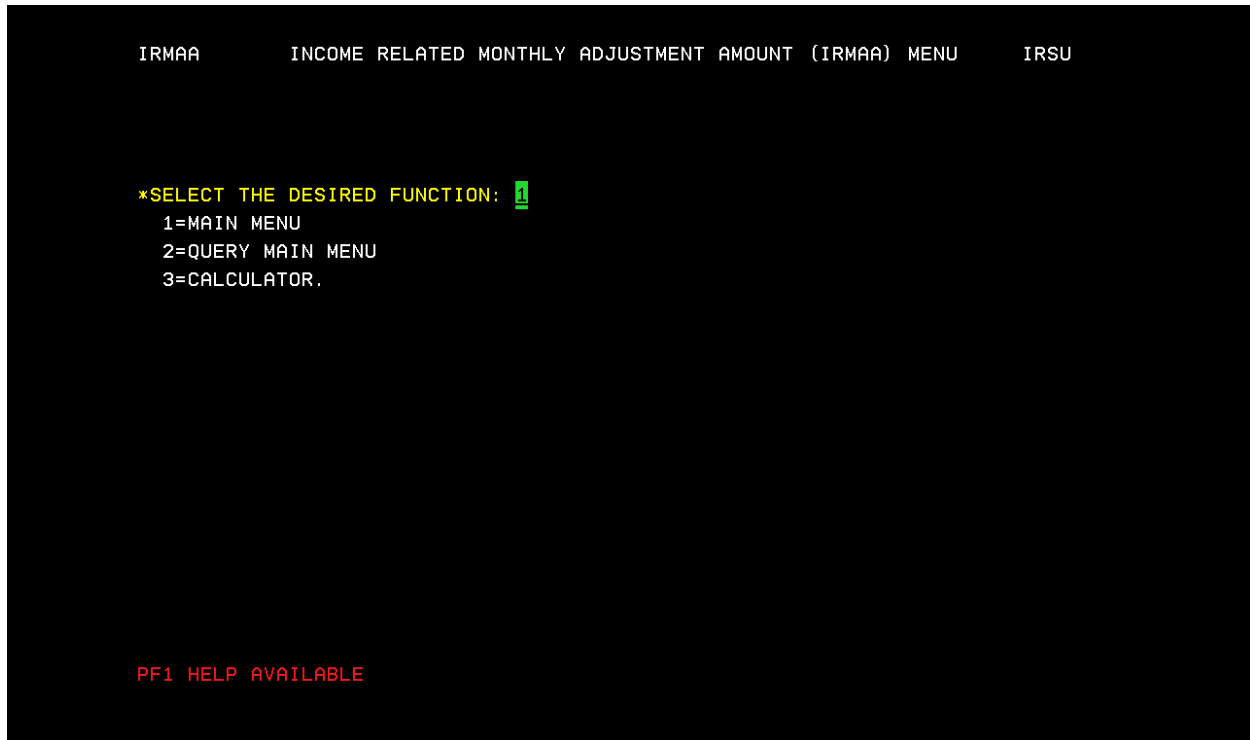
1. TITLE II/INITIAL CLAIMS              19. CPS DATA INPUTS/QUERIES
2. TITLE II/PE/MONET/IRMAA             20. DOORS
3. TITLE XVI/IC CLAIMS AND PE          21. RRB DATA INPUTS
4. SHARED PROCESSES                    22. ALTERNATE MODE FACILITY
5. ENUMERATION                          23. REPRESENTATIVE 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.



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



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 IRMA
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

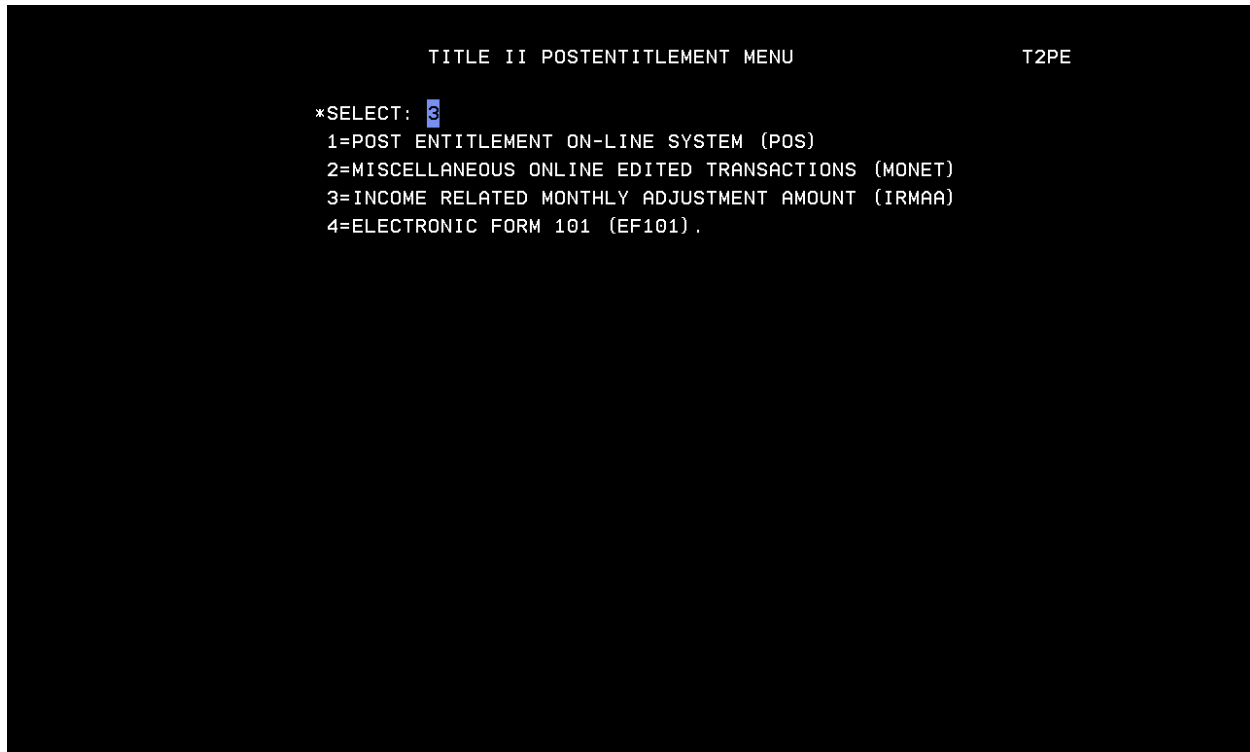
```
SSA MENU                                MAIN

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

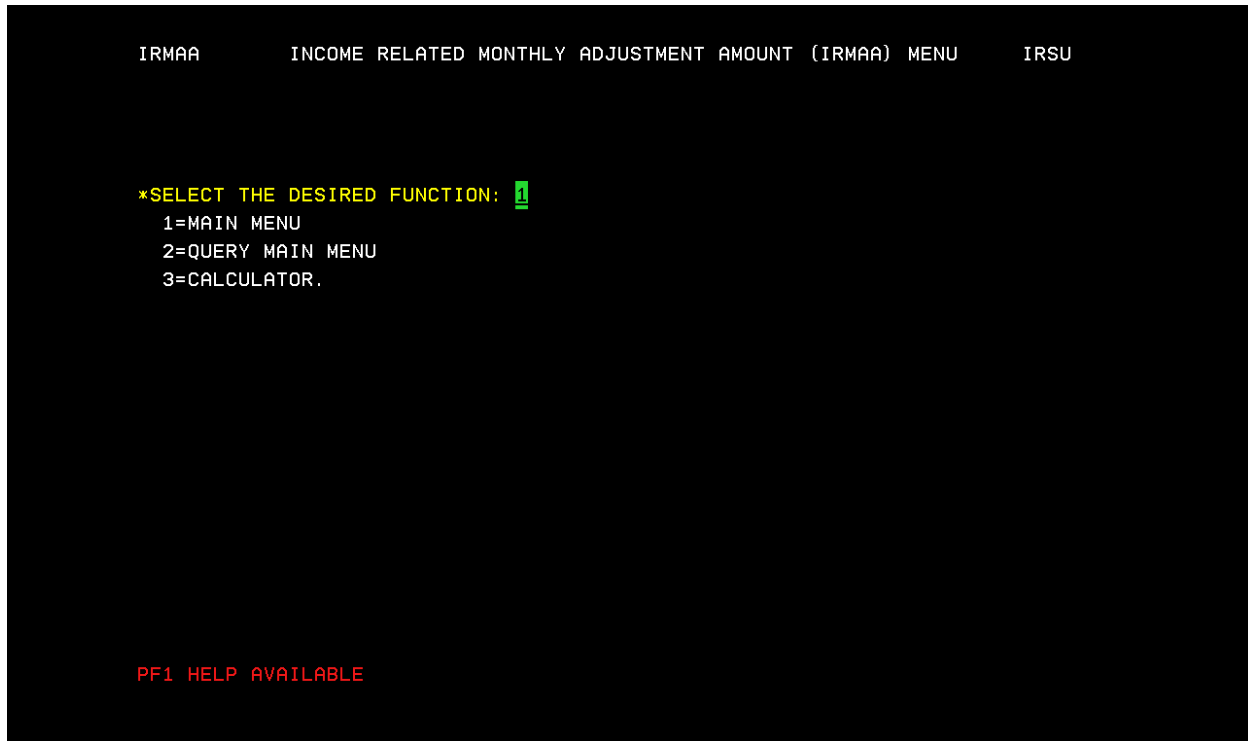
MB b                                     03/053
Connected to Host using LU V21A9320 .    \\s27ADF4\4E21-LexC782 on Ne10:
```

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

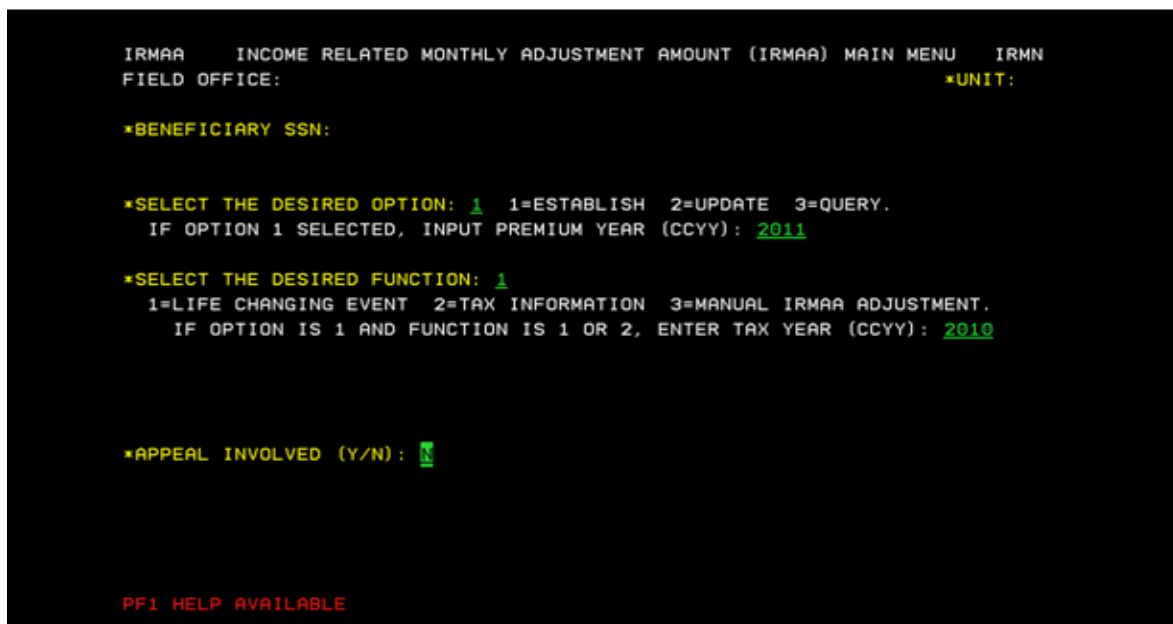




Select 1: MAIN MENU from the INCOME RELATED MONTHLY ADJUSTMENT AMOUNT (IRMAA) MENU.



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

```
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): Y

                                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): █

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

## 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): 

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