



January 2024

## New York State Health Insurance Program (NYSHIP) Annual Notice for Reimbursement of Income Related Monthly Adjustment Amount (IRMAA)

You are receiving this notice as a Medicare-primary enrollee or dependent under the New York State Health Insurance Program (NYSHIP) who may have been subject to a Medicare Part B Income Related Monthly Adjustment Amount (IRMAA) in 2023.

**Was your 2021 Federal Modified Adjusted Gross Income (MAGI):**

**More than \$97,000 for an individual federal tax return?**

**or**

**More than \$194,000 for a married filing jointly federal tax return?**

If **NO**, you did not pay IRMAA for Medicare Part B, and you have already been reimbursed for the standard Medicare Part B premium. No further action is required.

If **YES, and you paid IRMAA for Medicare Part B**, please complete the enclosed application and attach copies of the required proofs as outlined below. You may use the enclosed envelope to mail your application and documentation or securely fax them to 518-485-5590.

### Frequently Asked Questions

**Q: What is IRMAA?**

**A:** The Income Related Monthly Adjustment Amount (IRMAA) is an additional amount that you pay for your monthly Medicare premiums if you have higher annual earnings.

**Q: How do I know if I was required to pay IRMAA for Medicare Part B in 2023?**

**A:** If your income in 2021 was less than or equal to \$97,000 as an individual, or less than or equal to \$194,000 as a married couple, you did not pay IRMAA and the enclosed information does not apply to you. You may contact your local SSA office to verify if you paid IRMAA. The location of your local office can be found in your telephone directory or on the SSA website at [www.ssa.gov/onlineservices](http://www.ssa.gov/onlineservices).

**Q: Can I be reimbursed for Medicare Part D (drug coverage) IRMAA payments?**

**A:** No, the Department of Civil Service has no legal authority to reimburse the Medicare Part D portion of the IRMAA assessment.

**Q: What documentation is required to request reimbursement for IRMAA premiums paid in 2023 or prior years?**

**A:** In addition to a completed, signed application (enclosed), send proof of Medicare Part B payments for all months of the year for which you are requesting reimbursement (required for each person and each year you are applying for Medicare Part B IRMAA reimbursement). Refer to the chart below to identify acceptable proof of payment of your Medicare Part B premium.

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**Acceptable Proof of Payment Chart**

Documentation is required for each person for whom you are applying. Proof of payment must indicate payments made for all months of each year.

<b>Did you collect Social Security or Railroad Retirement benefits?</b>	<b>Enclose Proof of Payment of Medicare Part B premium:</b>	<b>Where can you obtain this proof?</b>
Yes	<p align="center"><b>Form SSA-1099</b> or <b>RRB-1099</b> (Retirement Benefit Statement)</p>	Social Security Administration or Railroad Retirement Board
No	<p align="center"><b>CMS-500</b> Medicare Premium Bill (Submit bill for each period paid) or <b>CMS-20143</b> Medicare Easy Pay Premium Statement</p>	Centers for Medicare and Medicaid Services (CMS)
Partial Year	<p align="center"><b>SSA-1099 and CMS-500 or CMS-20143</b> or <b>RRB-1099 and CMS-500 or CMS-20143</b></p>	(See above)

**Contact Information**

<p align="center"><b>Social Security Administration (SSA)</b> www.ssa.gov/onlineservices 1-800-772-1213</p>	<p align="center"><b>Centers for Medicare and Medicaid Services (CMS)</b> www.cms.gov 1-800-633-4227</p>	<p align="center"><b>Railroad Retirement Board (RRB)</b> www.rrb.gov/Benefits/Medicare 1-877-772-5772</p>
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**Q: Is there a deadline to apply for IRMAA reimbursement?**

**A:** Yes. Applications for reimbursement must be received within three years of the tax filing deadline for that year. You may apply for each year you paid IRMAA for the following calendar year(s): 2023, 2022, 2021 and 2020. However, 2020 IRMAA applications must be received by April 15, 2024 or they will not be considered for reimbursement. The Employee Benefits Division (EBD) will notify you if your application is incomplete.

**Q: Where can I find an update on processing of IRMAA reimbursement requests?**

**A:** To find the current processing date of IRMAA applications, please contact the EBD Call Center at 518-457-5754 or 1-800-833-4344 and press 4, then 2. A recorded message will be regularly updated advising you of the processing status of IRMAA applications. Applications are processed in the order they are received by EBD. Due to the volume of requests for IRMAA reimbursement, you can expect the process to be completed within 90 to 120 days from receipt and acceptance of all required IRMAA documents.