

**SUPPORTING STATEMENT FOR FORM SSA-44:
MEDICARE PART B INCOME-RELATED PREMIUM -- LIFE-CHANGING EVENT FORM**

OMB No. 0960-NEW

A. Justification

1. Need for the Information Collection and Legal/Administrative Justification

Section 811 of the *Medicare Prescription Drug, Improvement and Modernization Act of 2003 (MMA)* created subsection 1839(i) of the *Social Security Act*. This subsection establishes a new Medicare Part B premium subsidy reduction which will result in higher Medicare Part B premiums for Medicare Part B enrollees with income above an income threshold. Otherwise stated, affected beneficiaries will pay an extra premium amount in addition to the standard monthly Medicare Part B premium. This new premium subsidy reduction is also known as the “income-related monthly adjustment amount (IRMAA).” The new provision will be effective January 1, 2007.

The responsibility for determining the amount of Medicare Part B monthly premiums and the categories of monthly income-related adjustment amounts lies with the Centers for Medicare & Medicaid Services in the Department of Health and Human Services (HHS). However, the Social Security Administration (SSA) is responsible for several aspects of the process. Several tasks SSA will perform as part of the new Medicare Part B rules include the following: 1) determining which Medicare Part B beneficiaries are subject to the monthly adjustment amount based on Federal tax return information from the Internal Revenue Service (IRS); 2) deciding which category of adjustment beneficiaries are subject to and when it is effective; 3) accepting information from beneficiaries which updates or clarifies the tax data provided by IRS; and 4) making new initial determinations based on certain life-changing events.

Since SSA will be making determinations based on past IRS tax data, it is possible that beneficiaries’ financial situations may have changed due to a life-changing event (LCE) and that SSA’s IRMAA eligibility determination would no longer be accurate. SSA defines a life-changing event as: 1) marriage, 2) divorce/annulment, 3) spousal death, 4) work stoppage, 5) work reduction, 6) loss of income due to property loss, and 7) loss of pension income. Medicare Part B beneficiaries who experience any of these LCEs and a resulting significant income reduction can use new form SSA-44 to report them. This clearance package is for form SSA-44. Please note that a separate clearance package has been submitted to OMB to account for the public reporting burdens in the regulations discussing SSA’s information collection activities related to the new Part B rules. SSA’s authority to collect the information requested by the form is derived from section 1839(i)(4)(C) of the *Social Security Act*.

2. How, By Whom, and For What Purpose the Information Will Be Used

SSA will use the information collected by form SSA-44 to determine if the initial IRS tax data it used for that beneficiary is no longer up-to-date. If the Agency determines the LCE has significantly reduced the beneficiary’s income, it will use the information to update its original determinations or

SSA-44 (Medicare Part B LCE)
4/28/2026

to make new initial determinations.

SSA plans to collect most of the information requested by form SSA-44 in the field office via personal interviews. In such cases, the actual form will not be completed, but identical questions will be asked by SSA field office workers and completed on-screen. However, SSA estimates that approximately 10% of beneficiaries who experience LCEs will choose not to come to a field office; in such cases, beneficiaries will be directed to the SSA website, where they can download, print, complete, and mail in a PDF copy of the SSA-44. The form will not be printed by SSA or distributed to field offices for use.

This clearance package represents the burden for both situations (in-person interview and completion of the PDF copy). Copies of both the field office screen shots and the PDF form are attached to this clearance package.

3. Use of Other Forms of Information Technology for this Information Collection

Ninety percent of these forms are completed during personal field office interviews in which the information is keyed in electronically. The remaining ten percent of beneficiaries will use printable PDF versions of form SSA-44, which is not an electronic method under the Agency's Government Paperwork Elimination Act Plan.

4. Describe Efforts to Identify and Eliminate Duplication

The nature of the information being collected and the manner in which it is collected preclude duplication. There is no other collection instrument SSA uses that collects data similar to that collected here.

5. Impact on Small Business/Small Entities

This collection does not impact small businesses or other small entities.

6. Consequences of Not Conducting the Information Collection/Obstacles to Burden Reduction

If SSA did not conduct this information collection, it would have no means of allowing Medicare Part B beneficiaries experiencing LCEs to report their new financial status, which would put SSA in violation of *Section 811* of the MMA. Since the information will only be collected when a specific situation arises (i.e., when a beneficiary requests use of alternative information due to a life-changing event), it cannot be collected less frequently.

There are no technical or legal obstacles that prevent burden reduction.

7. Explain Any Special Circumstances Relating to This Information Collection

There are no special circumstances that would cause this information collection to be conducted in a manner inconsistent with 5 CFR 1320.5.

8. Publication of Federal Register Notices and Solicitation of Public Comment

The advance 60-day Federal Register Notice was published on July 31, 2006, at 71 FR 43270, and no public comments were received. The 30-day Federal Register Notice was published on October 2, 2006, at 71 FR 58041. SSA will forward any public comments it receives in response to the 30-

SSA-44 (Medicare Part B LCE)
4/28/2026

day Notice to OMB.

9. Payment or Gifts to the Respondents

SSA provides no payment or gifts to the respondents.

10. Describe Assurances of Confidentiality to the Respondents

The information requested is protected and held confidential in accordance with 42 U.S.C. 1306, 20 CFR 401 and 402, 5 U.S.C. 552 (Freedom of Information Act), 5 U.S.C. 552a (Privacy Act of 1974), and OMB Circular No. A-130.

11. Justification for Questions of a Sensitive Nature

The information collection does not contain any questions of a sensitive nature.

12. Burden Estimates for the Information Collection

SSA estimates that approximately 76,100 beneficiaries will request a new initial determination based on an LCE. As is explained in Question #2 of this Supporting Statement, SSA plans to schedule personal interviews in field offices to collect the information needed to process these requests. The form will be used when beneficiaries or their representatives prefer to download it, complete it, and submit it with the required evidence attached. SSA estimates that 90% of the 76,100 actions (68,490 respondents) will be handled by personal interviews in field offices, and that the form will be completed 10% of the time (7,610 respondents).

When beneficiaries or their representatives complete the form and gather the required evidence to attach, they will spend more time than those who schedule a personal interview, because they will have to spend additional time reading the form instructions. We estimate that the burden associated with completion of the paper form, including gathering all of the required evidence, will be 1.5 hours, compared to 1 hour for the first gathering the required evidence and then participating in a personal interview. The table below gives the burden:

| Method of Information Collection | Number of Respondents | Response Time | Burden |
|---|------------------------------|----------------------|---------------|
| Personal Interview | 68,490 | 60 minutes | 68,490 |
| Form | 7,610 | 90 minutes | 11,415 |
| | 76,100 | - | 79,905 |

The total burden of **79,905** hours is reflected as burden hours, and no separate cost burden has been calculated.

13. Cost to the Respondents

There is no known cost burden to the respondents.

14. Cost to the Federal Government

The annual cost to the Federal Government is \$3,419,173. This figure represents the field office staff time needed to process this information collection.

SSA-44 (Medicare Part B LCE)
4/28/2026

15. Changes to the Public Reporting Burden

This is a new information collection that will increase the public reporting burden by **79,905** hours.

16. Publication of the Results of the Information Collection.

The results of the information collection will not be published.

17. Displaying the OMB Expiration Date

SSA is not requesting an exception to publishing the OMB expiration date.

18. OMB Certification Requirements

SSA is not requesting an exception to the certification requirements at 5 CFR 1320.9 and related provisions at 5 CFR 1320.8(b)(3).

B. Collections of Information Employing Statistical Methods

Statistical methods are not used for this information collection.