

**RENEWAL OF THE COMPUTER MATCHING AGREEMENT  
BETWEEN  
THE DEPARTMENT OF THE TREASURY,  
THE INTERNAL REVENUE SERVICE  
AND  
THE SOCIAL SECURITY ADMINISTRATION  
FOR  
INCOME-RELATED ADJUSTMENTS TO MEDICARE PREMIUMS**

**IRS Project #693  
SSA Match #1310**

Under the applicable provisions of the Privacy Act of 1974, amended by the Computer Matching and Privacy Protection Act of 1988, 5 U.S.C. § 552a(o)(2), a computer matching agreement will remain in effect for a period not to exceed 18 months. Within 3 months prior to the expiration of such computer matching agreement, however, the Data Integrity Board (DIB) may, without additional review, renew the computer matching agreement for a current, ongoing matching program for a period not to exceed 12 additional months if:

1. such program will be conducted without any changes; and
2. each party to the agreement certifies to the DIB in writing that the program has been conducted in compliance with the agreement.

The following match meets the conditions for renewal upon signature of the officials authorized in sections VII and VIII of this renewal.

I. TITLE OF MATCH:

Computer Matching Agreement between the Department of the Treasury, the Internal Revenue Service and the Social Security Administration for Income-Related Adjustments to Medicare Premiums IRS Project #693 and SSA Match #1310.

II. PARTIES TO THE MATCH:

Recipient Agency: Social Security Administration (SSA)

Source Agency: Department of Treasury, Internal Revenue Service (IRS)

III. PURPOSE OF THE AGREEMENT:

This agreement between IRS and SSA is executed under the Privacy Act of 1974, 5 U.S.C. § 552a, as amended by the Computer Matching and Privacy Protection Act of 1988, and the Office of Management and Budget guidance interpreting those statutes.

The premiums for Medicare medical insurance (Part B) and Medicare prescription drug coverage (Part D) are federally subsidized. Federal premium subsidy is the portion of the full cost of providing Medicare Part B coverage paid by the Federal Government through transfers into the Federal Supplementary Medical Insurance Trust Fund or the true cost of Part D based on the national average base premium, as determined by the Centers for Medicare & Medicaid Services, transferred into the Prescription Drug Coverage Account of the Federal Supplementary Medical Insurance Trust Fund. SSA determines the premium subsidy adjustment amount, which increases the monthly premium amount(s) payable by beneficiaries whose modified adjusted gross income (MAGI) exceeds the applicable threshold established in section 1839(i) of the Social Security Act (Act) (42 U.S.C. § 1395r(i)).

Medicare beneficiaries enroll in Medicare Part B and subsequently become entitled. Most beneficiaries described in sections 226 and 226A of the Act (42 U.S.C. §§ 426 and 426-1) become entitled to Part A (hospital insurance) and are automatically enrolled in Part B, but are given the opportunity to disenroll from Medicare Part B. Beneficiaries who disenroll from Medicare Part B may later choose to enroll during a general enrollment period or a special enrollment period. The enrollment periods for Medicare are further defined in section 1837 of the Act (42 U.S.C. § 1395p).

Participation in Part D is voluntary. Under the provisions described in section 1860D-1 of the Act (42 U.S.C. § 1395w-101), Medicare beneficiaries entitled to Medicare Part A, Part B, or both, may enroll with a Medicare-approved private sponsor during a prescribed enrollment period to obtain assistance with the purchase of covered medication. Medicare Part D provides for discounted beneficiary costs for prescription drugs, but beneficiaries usually must pay certain premiums, deductibles, and copayments. Medicare Part D beneficiaries enroll into or disenroll from Part D through the sponsor.

This agreement sets forth the terms under which IRS will disclose to SSA certain return information, as described in the Internal Revenue Code § 6103(l)(20), for the purpose of establishing the correct amount of Medicare Part B premium subsidy adjustments and Medicare Part D premium increases under sections 1839(i) and 1860D-13(a)(7) of the Act (42 U.S.C. §§ 1395r(i) and 1395w-113(a)(7)), as enacted by section 811 of the Medicare Prescription Drug, Improvement, and Modernization Act of 2003 (MMA) (Pub. L. No. 108-173) and section 3308 of the Affordable Care Act of 2010 (Pub. L. No. 111-148).

IV. ORIGINAL EFFECTIVE AND EXPIRATION DATES OF THE MATCH:

Effective Date: October 1, 2020  
Expiration Date: March 31, 2022

V. RENEWAL AND NEW EXPIRATION DATES:

Renewal Date: April 1, 2022  
New Expiration Date: March 31, 2023

## VI. CHANGES:

By this renewal, IRS and SSA make the following non-substantive changes to the computer matching agreement:

In Article XV, "Persons to Contact," delete the section in its entirety and replace it with the following:

### A. **IRS Contacts:**

#### 1. Project Coordinator

Patricia Grasela, Reimbursable Program Analyst  
Data Services  
Office of Governmental Liaison, Disclosure and Safeguards  
BLN: 2.Q08-124  
2970 Market Street  
Philadelphia, PA 19104  
Telephone: (267) 466-5564  
Fax: (855) 207-0455  
Email: [Patricia.Grasela@irs.gov](mailto:Patricia.Grasela@irs.gov)

#### 2. Safeguards and Recordkeeping Procedures

Lynn Glass, Associate Director  
Safeguards  
Office of Governmental Liaison, Disclosures, and Safeguards  
1325 Broadway Plaza  
Fresno, CA 93721-1601  
Telephone: (510) 907-5168  
Email: [Lynn.Glass@irs.gov](mailto:Lynn.Glass@irs.gov)

### B. **SSA Contacts:**

#### 1. Agreement Issues

Marcia O. Midgett, Government Information Specialist  
Electronic Interchange & Liaison Division  
Office of Privacy & Disclosures  
Office of the General Counsel  
6401 Security Boulevard, G-401 WHR  
Baltimore, MD 21235  
Telephone: (410) 966-3219  
Email: [Marcia.O.Midgett@ssa.gov](mailto:Marcia.O.Midgett@ssa.gov)

2. Systems Security Issues

Robin Ott, Director  
Division of Title 2 and Medicare Analysis  
Office of Benefit Information Systems  
Office of Software Engineering  
Office of the Deputy Commissioner for Systems  
4700 Robert M. Ball Building  
6401 Security Boulevard  
Baltimore, MD 21235  
Telephone: (410) 597-1384  
Fax: (410) 597-1384  
Email: [Robin.Ott@ssa.gov](mailto:Robin.Ott@ssa.gov)

Jennifer Rutz, Director  
Division of Compliance and Oversight  
Office of Information Security  
Office of Systems  
Suite 3383 Perimeter East Building  
6201 Security Boulevard  
Baltimore, MD 21235  
Telephone: (410) 966-8253  
Email: [Jennifer.Rutz@ssa.gov](mailto:Jennifer.Rutz@ssa.gov)

3. Program Information

Zeenat Kolia  
Acting Team Leader  
Medicare Team  
Office of Enumeration and Medicare Policy  
6401 Security Boulevard, 2-A-17-E, Robert M. Ball Building  
Baltimore, MD 21235  
Telephone: (410) 965-8629  
Fax: (410) 966-5366  
Email: [Zeenat.Kolia@ssa.gov](mailto:Zeenat.Kolia@ssa.gov)

4. Reimbursement Information

Michele Bailey, Director  
Division of Reimbursable and Administrative Collections  
Office of Finance  
Office of Financial Policy Operations  
Office of Budget, Finance and Management  
Social Security Administration  
6401 Security Boulevard, 2-G-1 ELR  
Baltimore, MD 21235  
Telephone: (410) 965-0729  
Email: [Michele.Bailey@ssa.gov](mailto:Michele.Bailey@ssa.gov)

5. Data Exchange Liaison


Andrea Warren  
Program Analyst  
Agreements and Liaisons Branch  
Office of Data Exchange  
Office of Data Exchange and Policy Publications  
Social Security Administration  
6401 Security Boulevard, 4-B-9-F Annex  
Baltimore, MD 21235  
Telephone: (410) 966-5642  
Email: [Andrea.Warren@ssa.gov](mailto:Andrea.Warren@ssa.gov)

VII. DEPARTMENT OF TREASURY/INTERNAL REVENUE SERVICE SIGNATURES

Source Agency Certification

**Electronic Signature Acknowledgement:** The signatories may sign this document electronically by using an approved electronic signature process. Each signatory electronically signing this document agrees that his/her electronic signature has the same legal validity and effect as his/her handwritten signature on the document, and that it has the same meaning as his/her handwritten signature.


As the authorized representative of the agency named above, I certify that: (1) the subject matching program was conducted in compliance with the existing computer matching agreement between the parties; and (2) the subject matching program will continue without any changes for an additional 12 months, subject to the approval of the respective Data Integrity Boards of the parties.

Phyllis T. Grimes  Digitally signed by Phyllis T. Grimes  
Date: 2021.12.13 16:37:17 -05'00'      Date 12/13/2021

Phyllis T. Grimes  
Director, Governmental Liaison, Disclosure, and Safeguards  
Internal Revenue Service

Data Integrity Board Certification:

As Chair of the Treasury Data Integrity Board of the source agency named above, I certify that: (1) the subject matching program was conducted in compliance with the existing computer matching agreement between the parties; and (2) the subject matching program will continue without any change for an additional 12 months.

Ryan Law  Digitally signed by Ryan A. Law  
Date: 2022.01.27 16:24:46 -05'00'      Date 1/27/2022

Ryan Law  
Chairperson, Treasury Data Integrity Board  
Deputy Assistant Secretary for Privacy, Transparency, and Records

VIII. SOCIAL SECURITY ADMINISTRATION SIGNATURES

Recipient Agency Certification

**Electronic Signature Acknowledgement:** The signatories may sign this document electronically by using an approved electronic signature process. Each signatory electronically signing this document agrees that his/her electronic signature has the same legal validity and effect as his/her handwritten signature on the document, and that it has the same meaning as his/her handwritten signature.

As the authorized representative of the source agency named above, I certify that: (1) the subject matching program was conducted in compliance with the existing computer matching agreement between the parties; and (2) the subject matching program will continue without any changes for an additional 12 months, subject to the approval of the respective Data Integrity Boards of the parties.

**MARY ZIMMERMAN** Digitally signed by MARY  
ZIMMERMAN  
Date: 2021.11.24 13:17:09 -05'00'

Date \_\_\_\_\_

Mary Ann Zimmerman  
Deputy Executive Director  
Office of Privacy and Disclosure  
Office of the General Counsel

Data Integrity Board Certification:

As Chair of the Data Integrity Board of the recipient agency named above, I certify that: (1) the subject matching program was conducted in compliance with the existing computer matching agreement between the parties; and (2) the subject matching program will continue without any change for an additional 12 months.

**Matthew Ramsey** Digitally signed by Matthew  
Ramsey  
Date: 2022.01.21 13:41:37 -05'00'

Date \_\_\_\_\_

Matthew D. Ramsey  
Chair, Data Integrity Board