



17.50.10 Age 62 RECALCS

17.50.10.1 Introduction

Effective with May 1997 vouchers, age 62 recalc attainments will be done folderless.

17.50.10.2 Exception cases

Folders should still be requested if any of the following conditions exist:

- A vested dual benefit also needs to be calculated for the first time.
- A reject or review code is present on DATAQ.
- An SS adjustment is involved with a LAF C to E adjustment or questions exist on an accrual or retroactive payment.
- There is an outstanding overpayment shown on PARS.
- Employee is a dual annuitant and the other entitlement is a survivor annuity.
- Duplicate earnings are actually involved and the case needs to be reviewed from the ABD.
- There is a change in the total RR service on the RECALC G-90.
- The employee mechanical G-90 request rejected.
- Recurring work deductions apply and less than the maximum amount is being withheld.
- Legal process is involved (refer to BCS).
- Unusual circumstances warrant review of the file.
- The recalculated rate unexpectedly decreases instead of increases.

17.50.10.3 Policy

In all other cases, you will be making the adjustment without a folder. Follow the general instructions in this chapter for all folderless adjustments.



17.50.10.4 Examiner duties

You will be responsible for securing all information to adjust the claim using the checklist as a guide. If you determine the folder is necessary to do the adjustment, forward the case to your supervisor with a note as to why the folder is needed. The folder will be secured and returned to you or the supervisor will advise how the case can be done folderless.

17.50.10.5 Use of a checklist

A checklist has been created to assist you with folderless processing. This checklist provides the factors that should be considered and where on-line information can be located.

17.50.10.6 When to use a checklist

In the first month, you will complete a checklist for each case and send it to the authorizer. In future months, the checklist is for examiner use only. You may continue to complete a checklist for each case or you may use the checklist as a sight reference. Use whichever is comfortable for you but remember that you are responsible for thorough adjudication of the claim. A sample of the checklist is included in the Age 62 RECALCS hardcopy packet.

17.50.10.7 How cases will be assigned

IF the case involves... employee only employee and spouse a spouse only	THEN, you will receive: the 805 referral and RECALC G-90. the 805 referral and RECALC G-90. the 805 referral.
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17.50.10.8 Authorization of cases

Only cases that have recurring work deductions of a social security benefit offset will be sent to authorization.

17.50.10.9 Folder documentation

When the ROC award is produced, it will be matched to the paper material (the 805 and RECALC G-90, checklist and ALTA letter printout in select cases and sent to Claim Files for "Priority File Only."



17.50.10.10 Case samples

A copy of the checklist and two case samples were provided in hardcopy.

17.50.11 Additional Instructions For Work Deduction Cases

17.50.11.1 Recurring work deduction cases

If recurring work deductions are in force, determine if the maximum amount is being withheld each month.

17.50.11.2 Procedure

Using PREH and the table below, determine if the case can be processed folderless.

IF...	THEN...
recurring work deductions are in force, the maximum amount is being withheld, the maximum amount is not being withheld,	determine if the maximum amount is being withheld each month. process the adjustment folderless. secure the folder and use the actual estimate on file.

17.50.11.3 Verify LPE amount withheld

Using the PREH screens, compare the T2 AMT WH on the WKDED PREH screen to 50% of the net T2. If the T2 AMT WH is less than 50%, the maximum is not being withheld.

17.50.11.4 Verify regular WD amount withheld

Use the table below to check for full withholding of regular work deductions in an employee case.

Step	Action
1.	Reduce the TIER I SUBJ 2 WD on the T1 (2) screen by the age



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	reduction (2).
2.	Compare the result of step 1 to the T1 AMT WH on the WKDED PREH screen.

NOTE: On a spouse case, the maximum will equal 50% of the employee's age reduced work deduction amount.

17.50.11.5 ROC entries

If the maximum is being withheld, continue folderless processing taking the following steps.

Step	Action
1.	Enter the plugged figure of \$99,999 for the earnings estimate amount on the work deduction screen.
2.	Type in "folderless adjustment - plugged earnings estimate used."

NOTE: It is important to include the remarks for anyone reviewing the file at a later date as it is not easily apparent that an adjustment has been handled without a folder.

17.50.11.6 Comment

The \$99,999 plugged earnings estimate will allow ROC to recalculate the work deductions and continue to withhold the maximum amount.

17.50.11.7 Review calculation

While ROC will do the calculation for you, remember that if the T1 is recalculated, the amount subject to work deductions will increase.

Check to see that this is the case. If not, carefully review the adjustment and request the folder if you cannot reconcile.



17.50.12 Additional Instructions for Duplicate Earnings

17.50.12.1 G-90 Indicates Duplicate Earnings

When adjusting an employee and the G-90 indicates that there may be a problem with duplicate earnings, forward the G-90 to the quality analyst.

17.50.12.2 Analyst decision

<p>If the analyst determines that duplicate earnings are...</p> <p>not involved</p> <p>may be involved</p>	<p>Then...</p> <p>the G-90 will be returned to you with a note on the G-90 indicating that you may proceed with the folderless adjustment.</p> <p>the folder will be secured by the quality analyst and returned to you for handling.</p>
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