



17.90.10 Introduction

When a disability freeze is granted, a G-90 to include the DF in the computations is produced mechanically. A program is run in PREH each month identifying those claims receiving a DF grant during the month, creating the request for the DF G-90. Therefore, under normal circumstances, a DF G-90 does not have to be requested manually.

17.90.20 Case Assignment

Examiners will be given a “slash folder” with a white route slip attached displaying the claim number. The DF G-90 wage record will be included.

Examiners are responsible for securing all information necessary to process the annuity adjustment for each payee without the folder.

If it is determined that the folder should be secured, provide the senior claims examiner with the reason on the white route slip attached to the “slash folder”. Include your name on the route slip.

17.90.30 Determining if Folder Must be Secured

If any of the following conditions exist, the case cannot be handled folderless. Supply the senior claims examiner with the reason for securing the folder. Once the folder is received, adjust the annuity(s) accordingly. Otherwise, proceed to RCM 17.90.40

- The folder is not charged to Claim Files. (Check AFCS)
- The employee’s ABD is prior to 1/1/95. Refer to the DF G-90, item 1Q.
- Tier 1 and tier 2 changes result in a net decrease. Refer to screens 3210 RHTIER 1 and 3215 RHTIER 2 for tier changes, comparing the amounts shown in the PIA-1-AMT field, and T2-NET-AMT field respectively with the tier 1 and tier 2 on the DF G-90.
- The O/M may be payable. The O/M may apply when the FMB on the DF G-90 is greater than the RR rate (Check 3235 RHRATE, ANN-B4-SMI-DED-AMT field) and minor or disabled children were claimed.. Screen 4 of 3300 RHEE, RET-FAM-DIS-CHLD-CNT will indicate if children were claimed if RASI paid the initial award. Check 3277 RHRCPAY or TAX screen PF-21 (if prior to 1/1/95) to see if RASI paid the case. RASI voucher numbers are 290 through 320. If no RASI payment was made, request the folder to check for children claimed.



- The disability freeze date, refer to PREH, screen 3255 RHDSABL, DF-BEG-DT, is January.

If the DF-BEG-DT is	And the actual DF date is (see G-325)	Then PIA 1,4,7,8,9,17 and FMB are
The month of January	January	Correct.
The month of January	December	Incorrect. An erroneous eligibility year was used.

- Unusual circumstances warrant review of the folder.

17.90.40 Unit Coding and Handling

After determining that the case can be handled folderless, take the following steps:

1. Code on STAR PC control program using the appropriate code category.
2. Insert the DF G-90 and the coding/route slip in a blue jacket. It will be completed with a claim number.

17.90.50 Handling for No Payment or Rate Change Cases

DF G-90 wage records that indicate no payment or rate change should be stamped "Priority File Only" for matching to Claim Files.

17.90.60 Processing Folderless Annuity Adjustments

Check the following to determine what annuity components should be adjusted:

- 3210 RHTIER 1 and 3215 RHTIER 2 for tier changes, comparing those amounts to the amounts shown on the DF G-90.
- PIA 4, 7, and 8 on the DF G-90 for VDB entitlement. If the employee is under age 62, does the employee meet the 20/40 QC requirement for early VDB entitlement? The employee must have 20 QCs in the 40 consecutive quarters ending with the quarter of the DF to meet this requirement.
- If the employee does not meet the 20/40 requirement, but is newly vested or the VDB PIAs have changed based on the DF, update PREH with the correct data.



- 3050 RHREFUND screen to determine if the tax refund was previously paid. No data in the TAX-REFND-TOT-PD-AMT, TAX-REFND-INIT-ACCT-DT, and TAX-REFND-ACT-CODE fields indicates a tax refund has not been paid. If the employee is not vested (no PIA 4), check to see if a tax refund is payable.
- If the tax refund is \$5.00 or more, process folderless. If the tax refund is less than \$5.00, notate the G-90 to pay out on next annuity adjustment.

17.90.70 Medicare Enrollment

When a reopening case is received from Hearings and Appeals requiring an annuity adjustment based on the DF G-90, the retirement examiner must send an HSL to the Medicare section.

Completion of the "Disability Freeze Awarded" HSL to Medicare is as follows:

1. ACTION TO TAKE: Set Up Medicare - If the Medicare effective date is already past or near approaching, 5 months or less, "X" this item.

Set Up Callup - If the Medicare effective date is in the future, 6 months or more, "X" this item.

Release RL-310 - If the annuitant has not been notified of his/her Medicare effective date or the incorrect Medicare effective date was furnished, "X" this item. If an RL-210 was released, the person was notified of the Medicare effective date. The Hearings and Appeals letter will give the person the Medicare effective date. Always verify that the correct date was furnished.

2. DF/ONSET/DTE: This is item #24 on the OLDDS printout in file.
3. 74 ACT/GOVEMP: If this applies it will be indicated in the Remarks section on page 1 of the OLDDS printout in file. It will state "74 Medicare, Federal Employment or Government Employment". If a message like this appears in Remarks, "x" the item.
4. ADB: This is the ABD!
5. MEDICARE DOF: This is the Medicare Date of Filing. Use the filing date from the application in file (e.g., AA-1d, G-319, etc.).
6. MEDICARE EFF DTE ON RL-210: Found on the RL-210 in file, if one was released. If no RL-210 was released, leave this item blank.



Retirement Claims Manual

March 29, 2007

U.S. Railroad Retirement Board
844 North Rush Street
Chicago Illinois, 60611-2092

Phone: (312) 751-7139
TTY: (312) 751-4701
Web: <http://www.rrb.gov>

7. DTE AUTHORIZED ON OLDDS: Found on the bottom of page 3 of the OLDDS printout in file.
8. PREVIOUS DF ONSET DTE: Complete if a previous period of disability applies.
9. IF IPI CHILD: Complete this section if a DF is given to an IPI child.
10. PROVIDE THE FOLLOWING INFO IF IT IS NOT ON PREH: Always check to make sure the person is on PREH. If not, complete this section.
11. AUTHORIZER: Examiner name and date entered here.

SEND HSL TO: "A HI/SMI ENROLMNT" mailbox.