

# Social Security Administration

## Budget Overview

Fiscal Year 2025



Securing today  
and tomorrow

## MESSAGE FROM THE COMMISSIONER



Social Security is the most important act of social and economic justice that the people of the United States have done for each other, and it is my honor to serve as Commissioner of the Social Security Administration (SSA). Having dedicated my entire career to public service, I have seen firsthand the impact government programs such as Social Security have on the lives of individuals. We administer programs that play a vital role in maintaining the financial well-being of more than 72 million people. Our programs not only help lift and keep people out of poverty, but also support the national economy.

As I begin my term as Commissioner, I inherit an agency facing a customer service crisis. SSA has approximately 500 million interactions with the public each year through field office visits, call centers, and other engagements. While we have exceptional employees dedicated to serving millions of people, we are serving 50 percent more customers with less staff than we had in 1995. Staffing shortages and technology challenges have led to unacceptable wait times on our National 800 Number and for lengthy decisions on disability claims. It has also led to declining morale amongst our employees who report feeling more overworked and exhausted than those at any other Federal agency.

Staffing shortages, chronic underfunding, and beneficiary growth combined to create historic backlogs in our workloads. Initial disability claims pending are now over 1.1 million, almost double what they were at the end of fiscal year (FY) 2019. The average wait time for a disability decision is nearly 8 months and an additional 7 months for those who have requested an appeal of the initial decision compared to about 4 months at each step in FY 2019. Wait times on our National 800 Number have doubled from 20 minutes on average in FY 2019 to about 40 minutes.

With the increase in funding we received in FY 2023, we began restoring our staffing levels by hiring over 10,000 people in our offices and the State disability determination services to process our most critical workloads. We set a goal of achieving an average processing time for initial disability claims of 215 days (7 months) by the end of FY 2025. We are also striving to reach an average speed of answer of 12 minutes on the National 800 Number by the end of FY 2025. Millions of individuals count on the convenience and accessibility of our National 800 Number. We also plan to eliminate our backlog of hearings this year and complete a sufficient number of hearings in FY 2025 to prevent its recurrence and maintain an annual average hearing wait time of 270 days.

Now, we are confronted with managing a potentially austere FY 2024 budget that will undermine the progress we have made. We had to freeze hiring during the extended continuing resolution, which has caused our staffing levels to fall back to where they were in April 2023. If we continue the hiring freeze throughout FY 2024, we will lose over 4,500 full-time permanent

staff this fiscal year, resulting in our lowest staffing since 1972 (55,000 staff), including about 750 fewer employees in National 800 Number call centers and about 2,100 fewer employees in field offices across the country. This loss of staff will negatively impact call wait times, disability timelines, and other key performance metrics and be felt by the people we serve.

It is vitally important that we receive our FY 2025 President's Budget request of \$15.402 billion. Without sustained and sufficient funding, service will further deteriorate, jeopardizing the financial security of our customers—despite our unwavering commitment to improve customer experience. Considering the growth in our fixed costs, level funding does not cover the over \$600 million increase in our annual fixed costs such as salaries and rent on our more than 1,500 field and hearings offices across the country. Our Budget request will allow us to cover annual increases in our fixed costs, restore staffing to FY 2023 levels, and meet our service delivery goals.

This Budget ensures we will deliver accessible Social Security services to all eligible individuals, while maintaining rigorous stewardship and oversight of our programs. Our programs must reach underserved communities and people potentially facing barriers to accessing our services, including individuals with low income, limited English proficiency, mental and intellectual disabilities, and those facing homelessness. With the Budget, we can also collaborate with other Federal and State Government agencies and third-party organizations in local communities to ensure people are aware of their potential eligibility for Supplemental Security Income, especially for eligible children.

We must understand the experiences of SSA's customers, which will enable reforms to policy, design, technology, and operations to save time, reduce stress, and improve benefits access for millions of Americans, while maintaining rigorous stewardship and oversight of our programs. We must also develop a discipline for harnessing data and information technology (IT) to improve information sharing and get the best out of our large, siloed organization, and turn the agency around with improved service, a revamped IT infrastructure, and an engaged and qualified workforce. I have initiated an agency-wide, cross-cutting program to measure performance that I used successfully in the City of Baltimore and the State of Maryland, which relies on real-time data analysis to improve service delivery. I am also engaging with and listening to frontline workers. With sufficient funding, ideas for improving service from the people who are seeing and serving our customers, and strong performance management, we can make significant progress in providing the public with the service they expect and deserve going into the future.

At the beginning of the year, I sent an email to all SSA employees identifying top customer service challenges:

- 1) National 800 Number hold times;
- 2) Average processing time for disability determinations, and
- 3) Overpayment and underpayment process improvements.

These customer service challenges are cross-cutting. No component—however well-led—will be able to solve any one of these problems by itself. We must work together in timely, agile, and collaborative ways as never before.

In my first month, I traveled across the country and held town halls for employees in all 10 regions and in our headquarters, which surfaced a number of actionable ideas. For example, one process improvement is a new Automated Medicare Process (AMP) to improve back-end processing for internet Medicare claims, which testing has shown reduces a 7-8 minute process down to under 20 seconds. This innovation alone can gain the agency 30-40 work years of effort for employees to process online retirement and disability claims.

Public service is an important and noble calling. I have no doubt whatsoever that our hard-working employees are dedicated to providing the best service to our customers, and so am I. My ultimate goal is to make our programs more accessible and transparent, while keeping the American people at the heart of our work. With our FY 2025 President's Budget request of \$15.402 billion, we will make the essential improvements necessary to providing quality and timely service for the millions of people who depend on our programs.

Respectfully,

A handwritten signature in black ink, appearing to read "Martin O'Malley", with a stylized flourish at the end.

Martin O'Malley  
Commissioner

March 11, 2024

# SOCIAL SECURITY ADMINISTRATION OVERVIEW

## *Program Overview*

Our budget request will fund the administrative expenses for our three major programs: Old-Age and Survivors Insurance (OASI), Disability Insurance (DI), and Supplemental Security Income (SSI), in addition to other administrative expenses (see Figures 1 and 2). Our request includes funding to help ensure full and equitable access to our programs and to serve a historic high number of beneficiaries.

In fiscal year (FY) 2025, we will pay approximately \$1.6 trillion directly to our beneficiaries; our administrative costs are only about **1 percent** of the benefits we pay. Our programs are the largest anti-poverty programs in the nation. Further, people spend their benefits to pay for living expenses like housing, clothing, and food, putting money into local and State economies.

**OASI**: Established in 1935, the OASI program provides retirement and survivors benefits to qualified workers and their family members. The OASI program is one of the Nation’s most successful Government programs, and one that is part of the life of nearly every individual and family in the nation.

**DI**: Established in 1956, the DI program provides benefits for workers who become disabled, and their families.

**SSI**: Established in 1972, the SSI program provides payments to the aged and adults and children with disabilities or blindness who have income and resources below specific financial limits.

The Social Security Administration (SSA) also supports programs administered by other Federal and State agencies, as required by law, such as Medicare, Medicaid, the Supplemental Nutrition Assistance Program, State Children’s Health Insurance Program, E-Verify, and Federal Benefits for Veterans, as well as programs associated with the Employee Retirement Income Security Act of 1974, Coal Industry Retiree Health Benefit Act, and Help America Vote Act.

## *Component Overview*

Below are descriptions of our components, which are funded by our main administrative account, the Limitation on Administrative Expenses (LAE) account.

- The Office of Operations provides frontline and support services to millions of customers each year and completes our program stewardship work, ensuring we pay the right person the right amount at the right time:



- Over 1,200 field offices handle benefit claims, appeals, program integrity (PI) work, and post-entitlement events; process applications for Social Security and Medicare cards; enroll people in Medicare; and address urgent needs and questions from visitors and callers;
  - Our 24 teleservice centers answer a broad range of Social Security and Medicare questions; schedule appointments with our field offices; provide status updates on current claims or appeals; and ensure the accuracy of our records;
  - Our 8 processing centers (PC) handle the most complex benefit payment decisions, issue benefit payments after appeals decisions, determine and collect debt, correct records, and perform PI work; and
  - Our 10 regional offices around the country oversee and support our frontline offices across the nation.
- The Office of Hearings Operations holds hearings and makes decisions on determinations that people have appealed to the hearing level.
  - The Office of Analytics, Review, and Oversight handles the final level of administrative appeals, conducts quality reviews, and oversees agency data, analysis, and fraud prevention.
  - The Office of the General Counsel (OGC) provides administrative and programmatic legal counsel and prosecutes fraud cases. OGC also oversees privacy protections and ensures that privacy requirements are met.
  - The Office of the Chief Information Officer oversees our large information technology (IT) infrastructure and modernizes, expands, and improves our digital services.
  - The Office of Transformation is responsible for strategic guidance and oversight of enterprise-wide programs, addressing policies, business processes, and systems.
  - The Office of Civil Rights and Equal Opportunity promotes a diverse, inclusive, and accessible workforce to enable delivery of quality Social Security services.
  - Headquarters components, such as human resources, facilities, communications, legislation and congressional affairs, finance, and policy support our frontline offices.

**There are two other significant parts of our budget:**

- The Information Technology Services (ITS) budget represents the non-staff portion of our IT spending. Even as we focus on enhancing our digital services, a significant portion of this budget, around two-thirds, is allocated to maintaining our existing data

centers, computer networks, and phone systems across the country, ensuring they are up-to-date and functioning efficiently.

- The disability determination services (DDS) budget funds the State DDSs that make medical determinations for disability claims, reconsiderations, and continuing disability reviews (CDR). DDSs perform a critical part of our disability claims and PI processes.

**Figure 1: Benefit Payments and Beneficiaries by Program, FYs 2023-2025**

<b>Benefits (Outlays in Millions)</b>	<b>FY 2023 Actual</b>	<b>FY 2024 Estimate</b>	<b>FY 2025 Estimate</b>
<b>Trust Fund Programs</b>			
OASI	1,192,126	1,291,318	1,375,713
DI	149,443	153,462	160,587
Subtotal, OASDI	1,341,569	1,444,780	1,536,300
<b>General Fund Programs</b>			
SSI – Federal <i>Note: There were 12 monthly benefit payments in FY 2023 and will be 11 in FY 2024 and 12 in FY 2025.</i>	60,031	57,235	63,107
SSI State Supplementary Benefits	3,123	3,140	3,475
<b>Total</b>	1,404,723	1,505,155	1,602,882
<b>Beneficiaries (in Thousands)</b>	<b>FY 2023 Actual</b>	<b>FY 2024 Estimate</b>	<b>FY 2025 Estimate</b>
<b>Trust Fund Programs</b>			
OASI	57,529	58,869	60,216
DI	8,765	8,491	8,436
Subtotal, OASDI	66,294	67,360	68,652
<b>General Fund Programs</b>			
SSI Federal Recipients	7,382	7,304	7,273
SSI State Supplementary Recipients (with no Federal SSI payment)	134	135	137
<b>Total, including about 2.5 million concurrent recipients who receive SSI as well as OASI or DI</b>	73,810	74,799	76,062



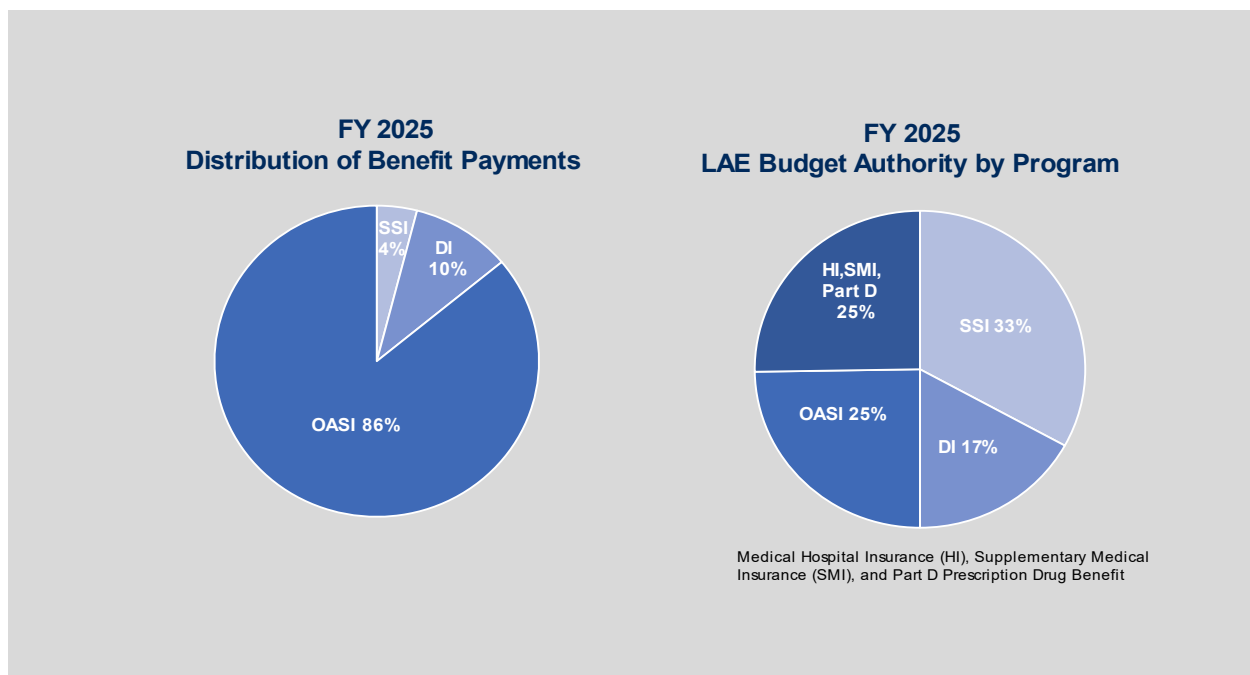
## Research Budget

**The funding request for research is \$91 million, \$5 million more than the FY 2024 Continuing Resolution (CR) level.** As in previous years, the Budget will fund data development and dissemination, modeling efforts, administrative research, evaluations of agency programs and initiatives, and retirement and disability policy research to better serve the public. We are also interested in working with Congress to renew Section 234 authority. For additional details, please see our Research and Demonstration Projects exhibit in the Program Budget section.

## Office of the Inspector General

**The funding request for the Office of the Inspector General (OIG) is \$121.3 million, an increase of \$6.6 million over the FY 2024 CR level.** The OIG's request would allow the OIG to perform its core mission of auditing and investigating SSA programs and operations, while also building its data analytics capacity, increasing data-driven decision-making, investing in IT and automation tools, and building and strengthening its workforce. The Budget also includes a transfer of \$19.6 million from the cap adjustment to the OIG to support CDI units.

**Figure 2: Benefits and Administrative Budget by Program**



## BUDGET HIGHLIGHTS

**Our FY 2025 Budget request is \$15.402 billion**, a \$1.3 billion or 9 percent increase from the FY 2023 level. As we serve more beneficiaries than ever in the agency's history, this increase is necessary to improve services at our field offices, State DDSs, and teleservice centers to assist retirees, people with disabilities, and their families. The Budget would reduce wait times on our 800 Number by over 20 minutes to 12 minutes, reduce initial disability claims wait times to an average of 215 days, and reduce the claims backlog by 15 percent.

The Budget assumes the same level of funding in FY 2024 as in FY 2023, with the exception of the higher program integrity cap adjustment amount. While we are working diligently to do so within our resource constraints, we face multiple challenges to restore service delivery to the standards both we and the public expect. Level funding in FY 2024 would have detrimental effects on service and halt the progress we made to begin improving service in FY 2023. We froze hiring across the agency, and staffing levels will reach the lowest staffing since 1972 by the end of this year. We also significantly reduced overtime levels in FY 2024 compared to FY 2023, limiting one of our most important tools for increasing processing capacity and supporting offices. As a result, wait times for a disability decision will increase and our backlogs will worsen. Relative to level staffing, a hiring freeze and loss of 4,500 staff in 2024 would add an estimated 20 more days and 175,000 more cases in the disability backlog. A hiring freeze would also increase our lengthy 800 Number wait times. We need a strong workforce to provide timely, quality service to the public. Staffing comprises 57 percent of our LAE budget, while the DDSs contribute another 18 percent (see Figure 3). The Budget will allow us to restore staffing to FY 2023 levels and increase overtime, which will help us increase processing capacity and improve customer service.

The Budget also supports our efforts to simplify and update the SSI application processes and expand access to agency programs and services through our outreach efforts, particularly for underserved communities. With this Budget, we will improve our IT systems; provide a more consistent, equitable, and accessible experience for our customers; reduce burdensome manual processes for our employees; increase self-service options on our National 800 Number; and expand our cybersecurity program. Further, the Budget prioritizes preventing and resolving improper payments.

Major investments include:<sup>1</sup>

- **Increasing Frontline Staff to Improve Customer Service.** Total Federal payroll costs of over \$8.7 billion, an increase of nearly \$700 million from the FY 2024 CR level, fund salaries and benefits of employees who provide direct service to the public to:
  - **Strengthen Service in Our Field Offices.** The Budget includes an increase of \$269 million to restore staffing in our field offices, which will deliver quicker

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<sup>1</sup> The numbers are not additive to the budget total. Some costs are associated with more than one category.

decisions on disability and retirement claims, shorter wait times to get an appointment in our offices, and improved telephone service in our field offices.

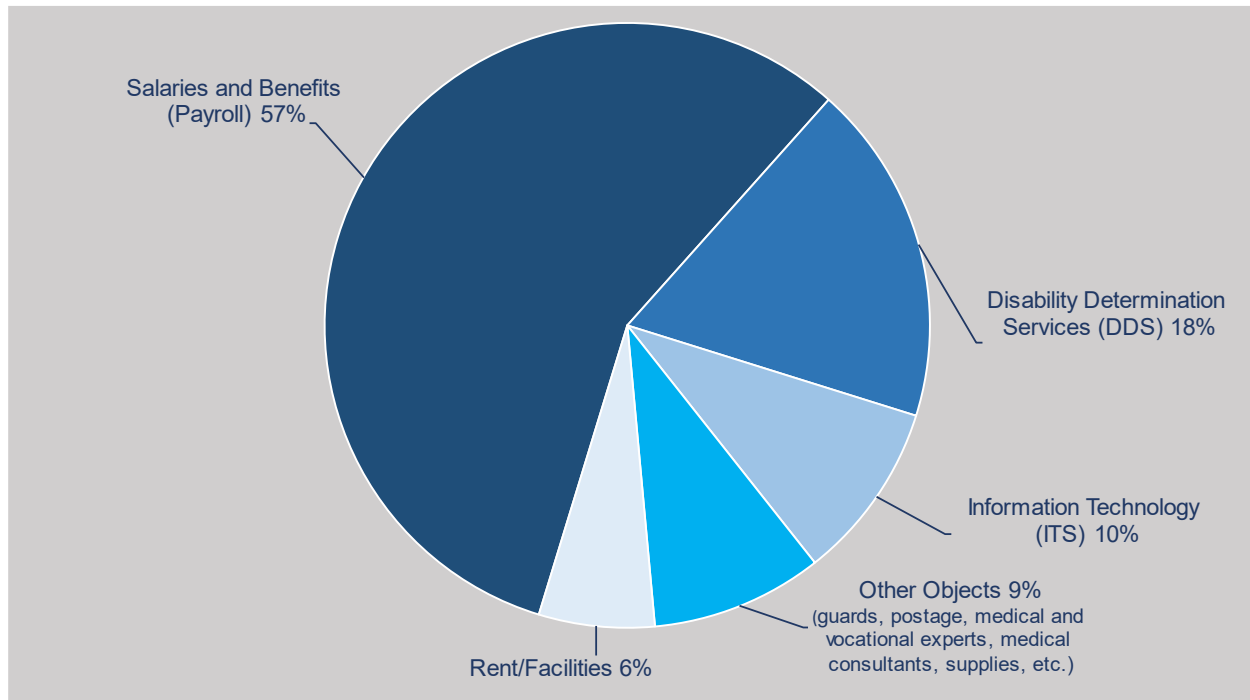
- **Improve National 800 Number Service.** The Budget includes an increase of \$79 million to increase staffing levels for teleservice centers to significantly reduce wait times by over 20 minutes on our 800 number.
- **Address PC Backlogs.** The Budget includes an increase of \$85 million for PCs to handle more complex benefit decisions and address the PC backlog.
- **Eliminate the Disability Hearings Backlog.** The Budget includes an increase of \$89 million for our staffing in our hearings offices to eliminate the backlog and maintain an average wait time of 270 days throughout FY 2025.
- **Reduce the Initial Disability Claims Backlog.** The Budget includes over \$2.8 billion to fund our State DDSs, an increase of about \$180 million from our FY 2024 CR level, to reduce the backlog by 179,000 cases (15 percent). The DDS budget funds payroll and benefits for State employees, workload processing costs, and other expenses. The Budget supports restoring staff to FY 2023 levels and includes pay increases<sup>2</sup> that help with recruitment and retention. The Budget expands processing capacity by increasing staffing and overtime in the DDSs over FY 2024 levels, yielding an expected 185,000 more initial disability claims processed and over 100,000 more reconsiderations than we estimate processing in FY 2024.
- **Modernizing IT Services for the Future.** The Budget includes nearly \$1.7 billion for IT, an increase of over \$200 million from our FY 2024 CR level, to help us maintain and modernize our large IT infrastructure and increase our suite of digital and automated services. Our IT budget supports ongoing high-priority projects, such as enumeration and service delivery modernization; cybersecurity efforts; and IT enhancements to prevent overpayments.
- **Improving Customer Experience (CX) and Equity.** The Budget request supports our efforts to build our internal CX capacity through our CX office to better understand the SSA customer experience, making focused improvements to our designated priority services, and delivering on our commitments in Executive Order (EO) 14058, [\*Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government\*](#) cross-agency life experience projects. We are also prioritizing actions outlined in our [\*Equity Action Plan 2023 Update\*](#). We are improving equity in the SSI program by increasing underpayment processing of our oldest and highest priority cases, including those disproportionately impacted by poverty.

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<sup>2</sup> SSA funds the full costs, including pay, for State DDS employees. Each State sets its own pay rates. Multiple States are requesting approval on pay increases for DDS employees to remain competitive.

- **Continuing PI Efforts.** The Budget includes \$1.9 billion, \$52 million above the FY 2024 Fiscal Responsibility Act (FRA) level, for dedicated PI work, including cost-effective PI reviews, cooperative disability investigations (CDI), and fraud. This level is consistent with the [Fiscal Responsibility Act \(FRA\) of 2023 \(P.L. 118-5\)](#).

**Figure 3: LAE Budget by Major Funding Category, FY 2025 Estimates**



**Figure 4: Funding and Staffing Table**

Sufficient and sustained funding is required to provide service to the public. Figure 4 displays actual and budgeted funding and workyears (WY).

<b>Budget Authority and Workyears (WY)</b> <i>(numbers may not add due to rounding)</i>	<b>FY 2023 Enacted</b>	<b>FY 2024 Estimate<sup>3</sup></b>	<b>FY 2025 President's Budget</b>
<b>Budget Authority, One-Year</b> (Dollars in Millions)			
Limitation on Administrative Expenses (LAE) <sup>4, 5</sup>	\$14,127	\$14,194	\$15,402
<i>(Dedicated Program Integrity Level, Base and Adjustment, included in LAE)<sup>6</sup></i>	<i>(\$1,784)</i>	<i>(\$1,851)</i>	<i>(\$1,903)</i>
Research and Demonstrations <sup>7, 8</sup>	\$86	\$86	\$91
Office of the Inspector General (OIG) <sup>9</sup>	\$115	\$115	\$121
<b>Total, Budget Authority</b>	<b>\$14,328</b>	<b>\$14,395</b>	<b>\$15,614</b>
<b>SSA WYs</b>	<b>FY 2023 Actual</b>	<b>FY 2024 Estimate</b>	<b>FY 2025 President's Budget</b>
Full-Time Equivalents <sup>10</sup>	58,485 <sup>11</sup>	57,490	59,211
Overtime	2,782	1,800	2,167
Lump Sum Leave	150	242	242
<b>Total SSA WY<sup>12</sup></b>	<b>61,417</b>	<b>59,532</b>	<b>61,620</b>
Disability Determination Services (DDS)	13,554	13,364	13,555
<b>Total SSA/DDS WY</b>	<b>74,971</b>	<b>72,896</b>	<b>75,175</b>
OIG	501	517	532
<b>Total SSA/DDS/ OIG WY</b>	<b>75,472</b>	<b>73,413</b>	<b>75,707</b>

<sup>3</sup> Our regular LAE funding level in FY 2024 assumes level funding of the annual appropriations included in the Consolidated Appropriations Act, 2023 (P.L. 117-328). The FY 2025 President's Budget assumes the Fiscal Responsibility Act (P.L. 118-5) level for the program integrity cap adjustment in FY 2024.

<sup>4</sup> LAE funding includes \$140 million in FY 2023, \$140 million in FY 2024, and \$170 million in FY 2025 for SSI user fees. LAE funding also includes \$1 million in Social Security Protection Act (SSPA) user fees.

<sup>5</sup> The Consolidated Appropriations Act, 2023 (P.L. 117-328) provided \$55 million in dedicated funding to address the hearings backlog.

<sup>6</sup> The Consolidated Appropriations Act, 2023 (P.L. 117-328) provided FY 2023 PI funding availability for 18 months (through March 31, 2024). The FY 2025 President's Budget assumes appropriations language for FY 2025 will provide for similar 18-month authority to obligate PI funds.

<sup>7</sup> These amounts include \$7 million in base research funding classified as mandatory.

<sup>8</sup> Congress appropriated \$86 million in three-year authority in both FYs 2023 and 2024 for research and demonstration projects. The FY 2025 President's Budget proposes \$91 million in FY 2025 for research and demonstration projects in three-year authority (available through September 30, 2027).

<sup>9</sup> The Consolidated Appropriations Act, 2023 (P.L. 117-328) allowed SSA to transfer \$15.1 million in FY 2023 from the LAE account to the OIG for the costs associated with jointly operated CDI units. The SSA Congressional Justification assumes a \$19.1 million transfer in FY 2024, the same level as in the FY 2024 President's Budget, and requests a \$19.6 million transfer for FY 2025. See the Program Integrity exhibit in the LAE section for more information.

<sup>10</sup> Full-time equivalents include those funded by the CDI unit PI transfer from the LAE account to the OIG.

<sup>11</sup> FY 2023 workyears are final numbers and will not match the preliminary estimates included in the Budget Appendix.

<sup>12</sup> A workyear (WY) is a measure of time spent doing work or being paid for some element of time (e.g., leave). It is the equivalent of one person working for one year (2,080 hours) and may consist of regular hours, overtime, or lump sum leave, which is payment for unused annual leave upon leaving the agency. WYs include time spent in full-time or part-time employment. Full-time equivalents and overtime WYs include those funded from dedicated funding to reduce the hearings backlog, dedicated funding for IT modernization, and dedicated funding for PI.

**Figure 5: FY 2025 Summary Statement Table**

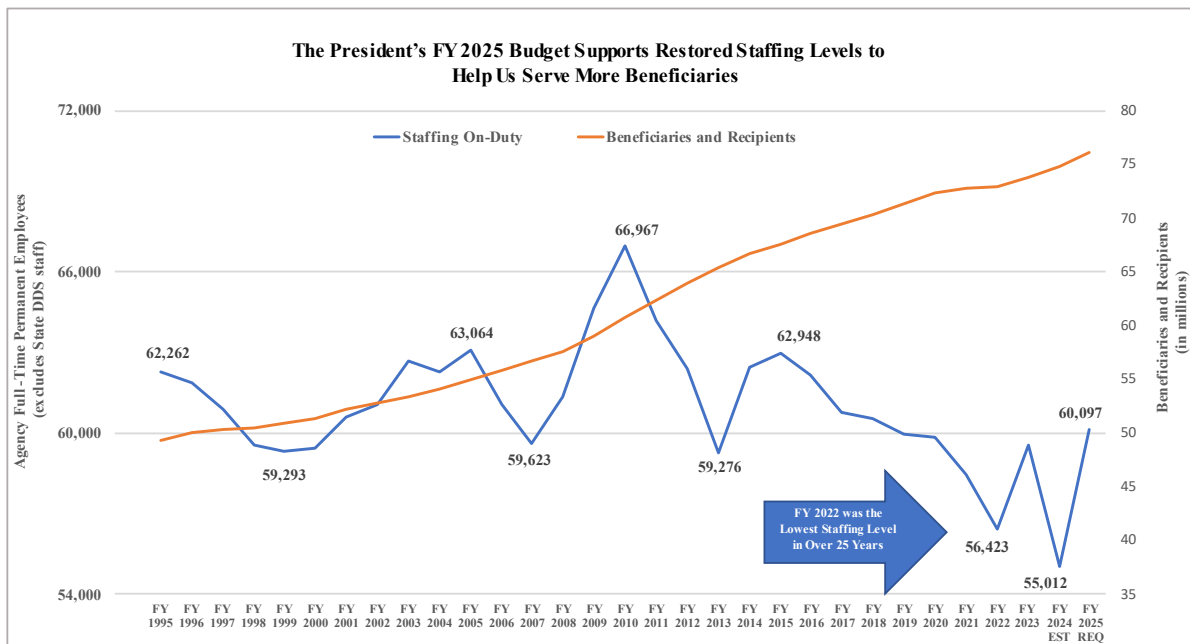
The Summary Statement table in Figure 5 displays the estimated distribution of our costs and WYs by major component group.

Dollars in Thousands	FY 2023 Actual		FY 2024 Estimate		FY 2025 Request		FY 2024 vs FY 2025 Increase/(Decrease)	
Component	Cost	Workyears	Cost	Workyears	Cost	Workyears	Cost	Workyears
Field Offices	\$3,887,914	29,002	\$4,024,699	27,720	\$4,295,168	28,609	\$270,469	889
Teleservice Centers	\$387,313	4,144	\$410,862	4,123	\$490,231	4,700	\$79,369	577
Regional Offices	\$533,911	1,247	\$533,857	1,071	\$554,327	1,088	\$20,470	17
<b>Subtotal, RC Field</b>	<b>\$4,809,138</b>	<b>34,393</b>	<b>\$4,969,418</b>	<b>32,914</b>	<b>\$5,339,726</b>	<b>34,397</b>	<b>\$370,308</b>	<b>1,483</b>
Program Service Centers and Office of Central Operations	\$1,231,337	10,400	\$1,274,545	9,839	\$1,362,996	10,043	\$88,451	204
<b>Subtotal, Operations</b>	<b>\$6,040,476</b>	<b>44,793</b>	<b>\$6,243,963</b>	<b>42,753</b>	<b>\$6,702,722</b>	<b>44,440</b>	<b>458,759</b>	<b>1,687</b>
Office of Hearings Operations	\$1,406,271	7,785	\$1,462,785	7,714	\$1,569,260	7,892	\$106,475	178
Office of the Chief Information Officer	\$650,901	3,323	\$695,317	3,359	\$748,958	3,386	\$53,641	27
Office of Analytics, Review, and Oversight	\$321,160	1,929	\$336,729	1,907	\$364,900	1,960	\$28,171	53
Office of the General Counsel	\$228,703	702	\$202,095	686	\$209,343	713	\$7,248	27
Headquarters	\$1,431,694	2,885	\$1,434,015	3,113	\$1,526,143	3,229	\$92,128	116
<b>Subtotal, SSA</b>	<b>\$10,079,205</b>	<b>61,417</b>	<b>\$10,374,904</b>	<b>59,532</b>	<b>\$11,121,326</b>	<b>61,620</b>	<b>\$746,422</b>	<b>2,088</b>
ITS	\$1,556,767		\$1,464,000		\$1,671,898		\$207,898	
DDS	\$2,474,800	13,554	\$2,630,938	13,364	\$2,809,000	13,555	\$178,062	191
<b>Total LAE</b>	<b>\$14,110,772</b>	<b>74,971</b>	<b>\$14,469,842</b>	<b>72,896</b>	<b>\$15,602,224</b>	<b>75,175</b>	<b>\$1,132,382</b>	<b>2,279</b>
OIG Transfer	<sup>13</sup>		(\$19,100)		(\$19,600)		(\$500)	
<b>Total, LAE after OIG Transfer</b>	<b>\$14,110,772</b>	<b>74,971</b>	<b>\$14,450,742</b>	<b>72,896</b>	<b>\$15,582,624</b>	<b>75,175</b>	<b>\$1,131,882</b>	<b>2,279</b>

<sup>13</sup> The Consolidated Appropriations Act, 2023 (P.L. 117-328) allows SSA to transfer \$15.1 million in FY 2023 from the LAE account to the OIG for the costs associated with jointly operated CDI units. This funding is not included in the FY 2023 total LAE.

**Figure 6a: Staffing History**

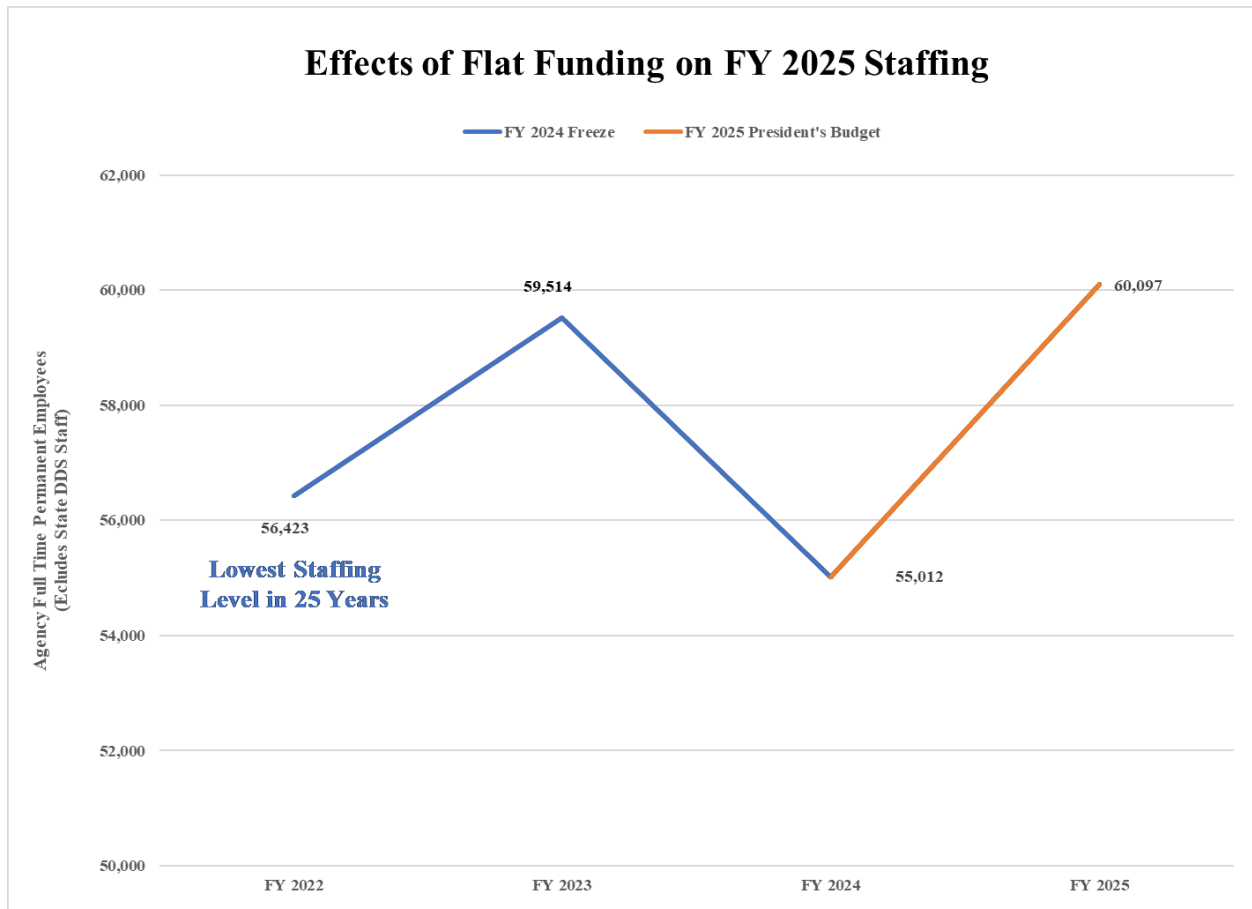
In FY 2022, we reached our lowest staffing level in over 25 years. The funding increase we received in FY 2023 allowed us to start rebuilding our workforce so that we could position ourselves to improve customer experience. Unfortunately, the austere budget climate in FY 2024 led us to implement a hiring freeze, which is reversing the progress we made in FY 2023. Under a full-year CR, staffing levels would reach the lowest levels since 1972 by the end of FY 2024 while the number of beneficiaries increase. It is critical that we receive sufficient funding in FY 2024 and FY 2025 to restore our staffing levels and improve service for the millions of people that depend on us.





**Figure 6b: Staffing Scenario**

We expect that a full-year CR would result in extremely low staffing levels by the end of the fiscal year, as we are forced to freeze hiring, and further reductions in public service (blue line). In contrast, the FY 2025 President's Budget (orange line) will allow us to restore our staffing to FY 2023 levels and begin to improve service.



## FY 2025 PERFORMANCE TABLE

Our Performance Table shows actual performance in FY 2023; estimated performance for FY 2024, assuming level funding and a hiring freeze; and estimated performance in FY 2025 based on full funding of the FY 2025 President’s Budget (see Figures 7 and 8). Restoring our staffing to FY 2023 levels will help us turn the corner and begin reducing backlogs and improving wait times in critical areas, especially in our disability workloads, where people currently face lengthy wait times. In addition, we will significantly improve our National 800 Number service. Please see the subsequent section on Strategic Goals for a discussion of performance.

**Figure 7: FY 2025 Performance Table**

Workload and Outcome Measures	FY 2023 Actual	FY 2024 Estimate	FY 2025 President's Budget
<b>Retirement and Survivor Claims (includes Medicare)</b>			
Retirement and Survivor Claims Completed (thousands)	6,693	6,654	6,735
<b>Disability Claims</b>			
Initial Disability Claims Receipts (thousands)	2,185	2,254	2,211
Initial Disability Claims Completed (thousands)	1,974	2,205	2,390
Initial Disability Claims Pending (thousands)	1,128	1,166	987
Average Processing Time for Initial Disability Claims (days)	218	230	215
<b>Disability Reconsiderations</b>			
Disability Reconsiderations Receipts (thousands)	546	618	669
Disability Reconsiderations Completed (thousands)	483	578	684
Disability Reconsiderations Pending (thousands)	290	325	310
Average Processing Time for Disability Reconsiderations (days) <sup>14</sup>	213	225	215
<b>Hearings</b>			
Hearings Receipts (thousands)	356	395	475
Hearings Completed (thousands)	378	435	425
Hearings Pending (thousands)	322	282	332
Annual Average Processing Time for Hearings Decisions (days)	450	345	270
<b>National 800 Number</b>			
National 800 Number Calls Handled (millions) <sup>15</sup>	30	31	32
Average Speed of Answer (ASA) (minutes) <sup>16</sup>	36	32	12
Agent Busy Rate (percent)	8%	2%	1%
<b>Program Integrity</b>			
Periodic Continuing Disability Reviews (CDR) Completed (thousands)	1,611	1,675	1,675
Full Medical CDRs (included above, thousands)	550	575	575
SSI Non-Medical Redeterminations Completed (thousands)	2,516	2,489	2,482
<b>Selected Other Agency Workload Measures</b>			
Social Security Numbers (SSN) Completed (millions)	18	19	19
Annual Earnings Items Completed (millions)	304	312	313
Social Security Statements Issued (millions) <sup>17</sup>	15	11	15
<b>Selected Production Workload Measures</b>			
Disability Determination Services Production per Workyear <sup>18</sup>	240	249	262
Office of Hearings Operations Production per Workyear	69	81	81
Additional Operations Workyears Needed to Process Incoming Work (Workyear Shortfall) <sup>19</sup>	N/A	(2,500)	(2,500)

<sup>14</sup> Average processing time for hearings is an annual figure. In FY 2024, we are continuing in-person hearings and to prioritize individuals who have waited the longest for a hearing. Our projection for the end of year monthly (September) processing time for hearings is 270 days for FYs 2024 and 2025.

<sup>15</sup> National 800 Number call volumes include those handled by automation. For FYs 2024 and 2025, we project about 4 million automated calls handled in each year.

<sup>16</sup> The 12-minute target in FY 2025 is an aspirational goal, which we will continue to evaluate as we gain experience with NGTP and monitor the impact of the hiring freeze in FY 2024 on the number of agents we have available to answer the phones.

<sup>17</sup> The Social Security Statements Issued measure includes paper Statements only. It does not include electronic Statements issued. In FY 2023, [my Social Security](#) users accessed their Social Security Statements 32.6 million times. Consistent with FY 2023, in FYs 2024 and 2025, we will send paper Statements to people aged 60 and older who are not receiving Social Security benefits and who are not registered for a [my Social Security](#) account, at a cost of approximately \$8 million and \$11 million, respectively. It would cost approximately \$151 million more in FY 2025 to send Statements to individuals aged 25 and older.

<sup>18</sup> DDS Production Per Workyear (PPWY) for FY 2023 includes cases completed via Federal assistance. However, the FYs 2024 and 2025 DDS PPWY figures displayed on this table exclude cases completed via Federal assistance. For comparison purposes, the FYs 2024 and 2025 DDS PPWY including the estimated number of cases completed via Federal assistance would be 272 and 291, respectively.

<sup>19</sup> We do not have a budgeted workload measure for "Additional Operations Workyears Needed to Process Incoming Work (Workyear Shortfall)" in the actual year.

## FY 2025 PRESIDENT'S BUDGET BY WORKLOAD

**Figure 8: FY 2025 President's Budget by Workload**

SSA Workloads (Dollars in Millions)	FY 2024 Estimate	FY 2025 President's Budget
Retirement and Survivors Claims Completed	\$1,607	\$1,709
Initial Disability Claims Completed	\$4,194	\$4,547
Reconsiderations Completed	\$595	\$677
Hearings Completed	\$2,433	\$2,660
Social Security Numbers	\$873	\$944
CDRs and Redeterminations Completed	\$1,797	\$1,848

## STRATEGIC GOAL 1: *OPTIMIZE THE EXPERIENCE OF SSA CUSTOMERS*

This Budget focuses on improving the public's experience with, and access to, our services and programs.

We are designing and delivering services that reflect the perspective of the people we serve. Our [FYs 2022–2026 Agency Strategic Plan](#) focuses on delivering lasting change to empower our employees and serve our customers. We are adopting modern ways to operate and re-engineer policy and business models to improve customer experience. Our CX office is part of the Office of Transformation, embedding customer-centered principles into the most critical enterprise business and technology enhancements that serve the public and support our frontline employees. Our CX office coordinates CX management practices and standards agency-wide, and supports, guides, educates, and enables us to ensure we consistently prioritize the customer's experience. The Budget helps us further integrate and expand CX practices across our organization. For additional details, please see our CX exhibit in the LAE section, and [Performance.gov](#).

We plan to centralize how we collect customer feedback on trust and satisfaction, ensuring we have real-time data directly from customers on our agency's performance across all major service channels (i.e., online, National 800 Number, and field offices). We successfully migrated all online surveys to the new Voice of Customer (VoC) Feedback platform, which is a major milestone towards standardizing and integrating VoC feedback within our decision-making processes. We established a baseline satisfaction measurement that complies with Federal requirements, allowing customers to access our survey at any time and provide feedback on their experiences.

In FY 2025, we will fulfill our commitments in EO 14058, [Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government](#) and make focused improvements to our three designated priority services: *Filing for Social Security Retirement Benefits*, *Applying for a Replacement Social Security Card*, and *Obtaining Adult Disability Benefits*.

We will contribute to cross-agency [life experience projects](#), which are intended to help streamline service delivery at critical points in a person's life when they interact with Government. We are engaged in the *Approaching Retirement* and *Facing a Financial Shock* life experiences. We worked with CX industry experts to develop journey mapping standards and CX decision modeling on each of these life experiences to help us identify which aspects of our current service delivery channels generate the greatest customer pain points.

## ***Identify and Address Barriers to Accessing Services***

We are working to improve access to our programs by identifying and eliminating disparities in service that people with disabilities, workers, and their families may face when doing business with us. The Budget supports our commitment to improving equity in our SSI program access through outreach and improved benefit delivery, including to communities of color and underserved communities. For more information on our actions and progress, please see the Advancing Equity, Including Diversity, Equity, Inclusion, and Accessibility (DEIA) in the Workforce, and Conducting Outreach to People Potentially Facing Barriers exhibit in the LAE section. Provided below are some highlights.

### **Accomplishments**

In FY 2023, we:

- Achieved our goal of increasing the number of SSI applications from underserved communities by 25 percent, relative to the 2021 baseline. We received nearly 135,000 SSI applications from underserved communities in FY 2023;
- Notified 1.4 million Social Security beneficiaries of their potential eligibility for SSI, resulting in 48,567 approved SSI claims paying over \$11 million in benefits through March 17, 2023;
- Expanded race and ethnicity data collection to determine whether our programs are equitably serving our applicants and beneficiaries;
- Increased outreach and developed relationships with a diverse group of advocates, civil rights organizations, and community organizations. For example, we published 12 Dear Colleague Letters to promote and raise awareness of our programs and services to underserved communities, which were distributed to more than 12,000 contacts;
- Implemented two mandatory agency-wide DEIA trainings on workplace harassment, discrimination, and disability awareness; and an executive training regarding inclusive workplace cultures;
- Developed DEIA training that will help our adjudicators understand, recognize, and remove barriers to fair and equitable decision making; and
- Made it easier for customers to provide feedback by providing additional options for accessing agency surveys, such as placing Quick Response (QR) codes on notices and receipts and sending targeted emails to make it easier for our customers to provide feedback.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Audit existing public information, including webpages, and revise materials using plain language to make eligibility requirements clear and inclusive for women, same-sex couples and families, people from underserved communities, and others who access public benefits;
- Increase availability of translated materials and the number of languages in which those materials are offered, improve access to language interpretation services, and increase culturally attuned outreach to Native American and Alaska Native, limited English proficiency, and migrant communities;
- Air television and radio public service announcements, run paid social media and marketing campaigns, and promote the outreach toolkit, [Outreach Materials for People Facing Barriers](#);
- Reach out to unrepresented claimants at the pre-hearing phase to inform them of their rights at the hearing level of appeal;
- Make hearings more accessible to claimants through in-person, video hearings at an SSA office, and telephone and online video hearing options;
- Expand engagement with claimant representative and disability advocacy communities;
- Engage with Tribal Coordinators in Urban Indian Centers to better assist Tribal members with a targeted focus on understanding their training needs and building partnerships;
- Enhance our online services to reduce the need for people to come into our offices; and
- Improve the customer experience for initial disability applicants through changes to policy, business processes, and IT, as informed by a study of adult disability applicants' journey from application to a final decision.

## *Expand Digital Services*

We are committed to making our services more convenient and efficient. [my Social Security](#), our personalized, self-service alternative to telephone and in-person services, gives our customers access to a growing suite of services using their mobile device or computer. Through January 2024, more than 84 million people have signed up to use [my Social Security](#) to conduct their business online securely and conveniently. In FY 2023, we surpassed 400 million successfully completed online transactions in one year. The Budget provides for ongoing



digitization of our services and forms that are most viewed or utilized by the public or otherwise important for public engagement.

## Accomplishments

In FY 2023, we:

- Simplified our secure credentials process for *my Social Security* portal access, supporting increased account registrations;
- Released the annual updates to the Social Security *Statement* and supplemental fact sheets to provide information on retirement planning tools;
- Rolled out a simple and secure way for customers to upload digital forms, documents, and electronic signatures online. The goal is to reduce or eliminate paper processes by automating workflows and updating policies to better connect technicians with customers and their evidence;
- Successfully deployed self-scheduling of in-office enumeration appointments through the Enterprise Scheduling System (ESS) to all 50 States, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands;
- Expanded the use of the Internet Social Security Number Replacement Card (iSSNRC) option to request a replacement card for name change due to marriage to additional States. As of February 2024, the name change feature is available in Arkansas, Georgia, Missouri, South Dakota, Wyoming, Maine, Michigan, North Dakota, Montana, Idaho, Kentucky, Maryland, Rhode Island, Nebraska, Colorado, Virginia, and Wisconsin; and
- Released CDR product functionality to allow adult beneficiaries with no representative payee to fully complete their review online.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Simplify our SSI application policy and procedure with the goal of making it easier for individuals to apply for SSI, especially children;
- Expand online self-scheduling options to the public;
- Expand video service options for hearings, interviews for replacement cards, and post-entitlement actions;
- Increase the number of services and forms available on our secure digital platforms to provide more convenient, user-friendly, and secure digital self-service options;

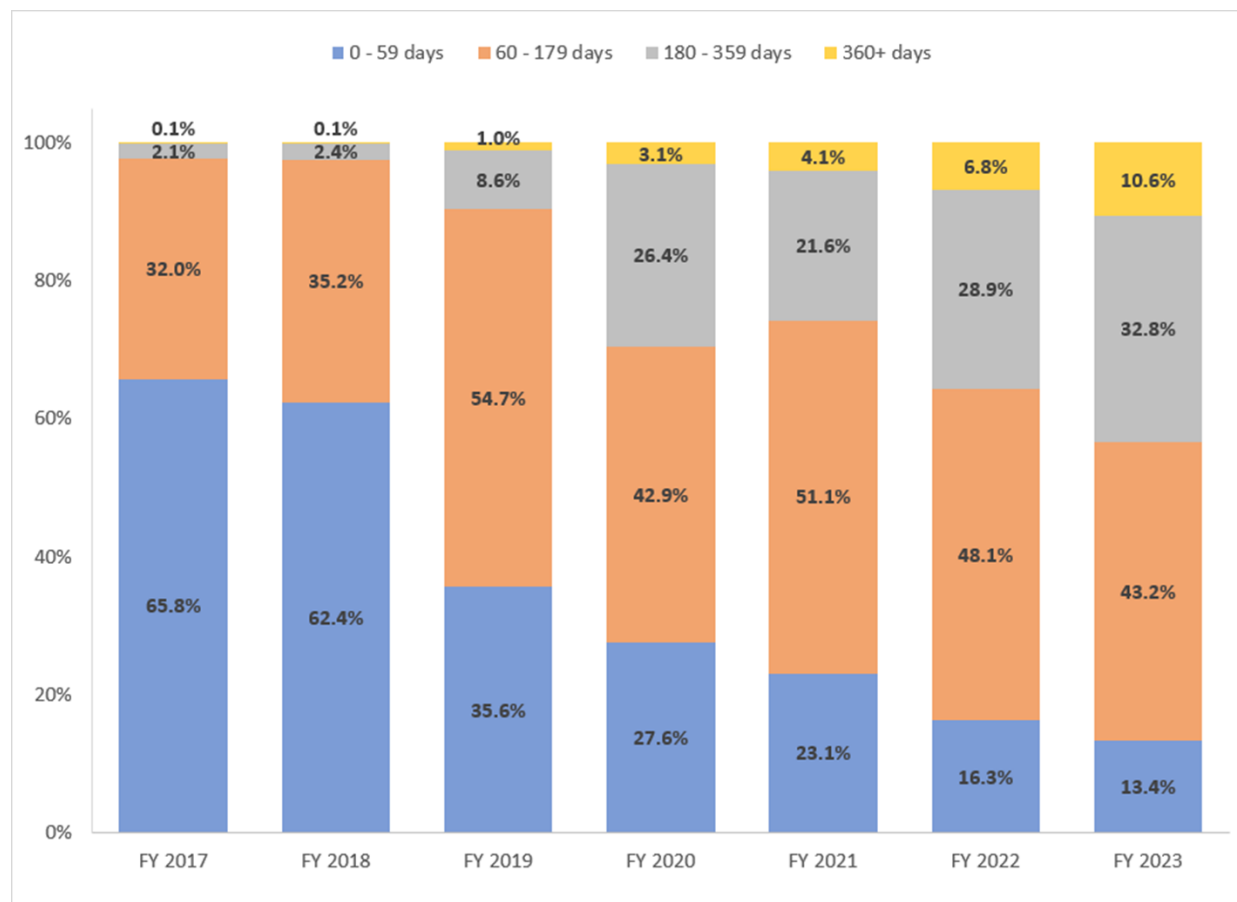
- Expand the option of requesting a replacement card online for name change due to marriage to additional States;
- Roll out and increase functionality for a mobile-accessible, online process for customers to upload forms, documentation, evidence, or correspondence and electronically sign forms; and
- Conduct cognitive testing on the Spanish *Statement* and fact sheets and implement feedback from this cognitive testing to improve our Spanish-language documents.

## ***Build a Customer-Focused Organization***

### **Reducing the Initial Disability Claims Backlog**

We have a public service crisis in our disability program. Initial disability claims pending increased to over 1.1 million in FY 2023, and the percentage of these cases that are older than 180 days also increased (see Figure 9). The average wait time to receive a disability decision is nearly 8 months and an additional 7 months for those who have requested an appeal of the initial decision. Staffing shortages and difficulty hiring and retaining people in the DDSs contributed to these long delays.

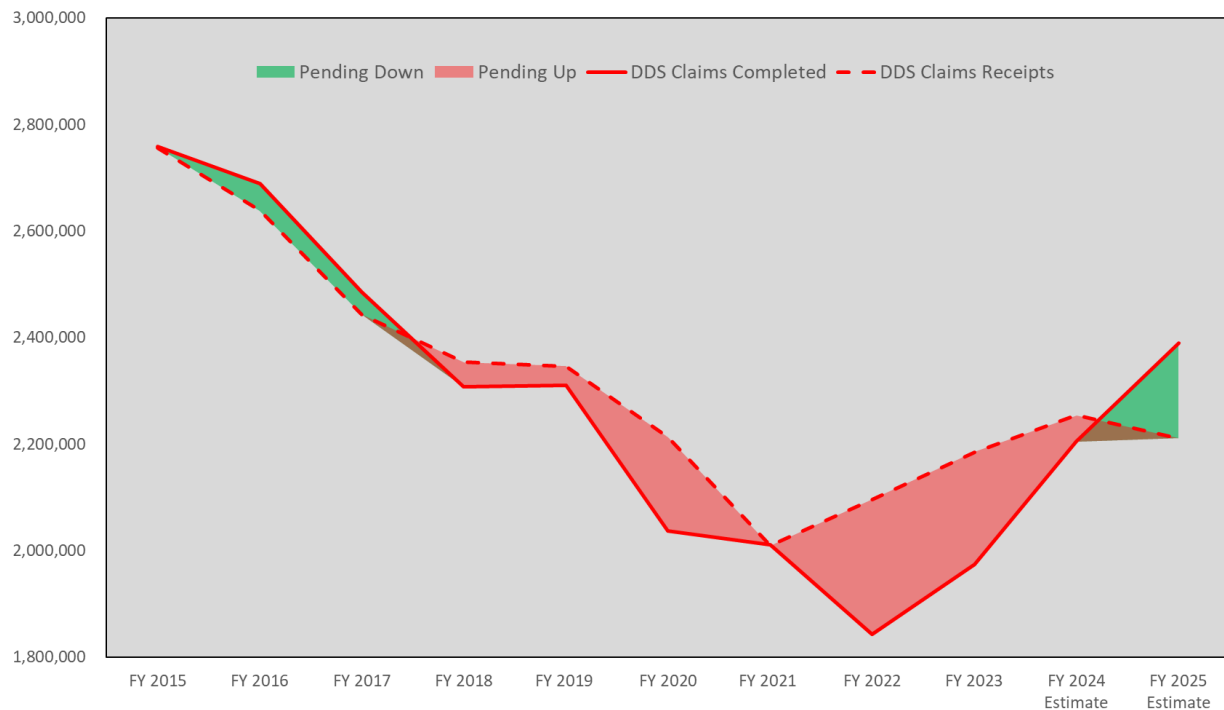
**Figure 9: The Percent of Initial Disability Claims Pending Over 180 Days is Growing**



In FY 2023, we hired about 2,500 DDS employees to increase processing capacity, ending the year with over 700 more people than in FY 2022. We deployed Federal staff units to assist the DDSs in processing cases, especially in regions facing disproportionate staffing losses. We are using our disability case processing system (DCPS2) and other technologies to help us identify cases that meet the criteria for expedited processing. As a result, we estimate we will process over 230,000 more initial disability claims in FY 2024 than we did in FY 2023. Our goal is to process 92 percent of initial disability claims that started the fiscal year 180 days or older by September 30, 2024.

Unfortunately, we expect that backlogs and wait times will grow in FY 2024 due to the hiring freeze and minimal overtime as we operate under a CR. While we expect to process more cases this year, we will have significantly less staff at the end of the year than at the beginning. The Budget will allow us to restore our staffing to FY 2023 levels and expand our capacity to process significantly more cases. In FY 2025, we expect to process over 180,000 more initial disability cases than in FY 2024 (see Figure 10), allowing us to achieve an annual average processing time of 215 days—over 2 weeks faster than this year. While it will take a multi-year effort to see significant improvements, the Budget will put us on the right path.

**Figure 10: Initial Disability Claims Receipts and Completed, FYs 2015–2025**



## Accomplishments

In FY 2023, we:

- Established cadres of Federal staff to assist DDSs who need help the most with case processing capacity. These cadres processed over 42,000 cases in FY 2023;
- Published a Notice of Proposed Rulemaking (NPRM), [\*Intermediate Improvement to the Disability Adjudication Process, Including How we Consider Past Work\*](#), to reduce from 15 to 5 years the number of years of past relevant work that SSA considers when making disability decisions. This rule will reduce burden on claimants and our staff while still providing us with enough relevant information to make accurate disability determinations and decisions;
- Collaborated with the Office of Personnel Management (OPM) to streamline the background check process for new hires and reduced the clearance time from an average of 30 days to 12 days so that we can get new DDS employees working earlier;
- Created a video-on-demand of “a day in the life” of a disability examiner to educate potential applicants on what the job entails while also diversifying platforms for recruitment, including the use of Handshake to reach college students;

- Developed a Site-to-Site Training Tool to facilitate a way for different DDS sites to match training needs with extra training capacity available in other sites;
- Developed screening questionnaires to assist DDSs in identifying the most qualified candidates prior to the interview process;
- Developed an exit survey to assist DDSs in identifying trends and reasons for attrition, while providing the opportunity to develop retention strategies; and
- Worked with the DDS to simplify Transferability of Skills Assessment policies and revise the vocational development policy so applicants better understand vocational assessments.

## Major Initiatives

In FYs 2024 and 2025, we are improving business processes and policies and enhancing our IT to help us process cases quicker:

- We are utilizing staff from across the agency to assist the DDSs and are having high-performing States assist us with workloads in other States. We have cadres of Federal employees that assist States with large backlogs, by processing initial disability claims or offloading disability hearings work.
- We are engaging State DDS Administrators to increase retention through initiatives such as pay increases. In FY 2023, we approved 14 pay increases or incentives for 12 States. We have additional salary increases from States that we expect will be implemented in FY 2024 or beyond.
- We will publish the final rule, [\*Intermediate Improvement to the Disability Adjudication Process, Including How we Consider Past Work\*](#), in FY 2024.
- We established a national contract with medical and psychological consultants to assist the DDSs in the States who are most in need.
- We are working with the DDSs to update vocational policy training materials.
- We are making user-requested enhancements from the DDSs and Federal sites to optimize DCPS2 functionality and improve processing efficiency.
- We are using Intelligent Medical Language Analysis Generation (IMAGEN), a decision-support tool, to ensure accuracy and improve efficiency in the review of lengthy medical reports. Since April 2023, the IMAGEN Predictive Listing Dossier has identified over 11,000 pending claims that contain evidence with a high probability of meeting or

equaling a medical listing. This tool enables States to identify potential allowances or presumptive disability determinations quickly, reducing wait times.

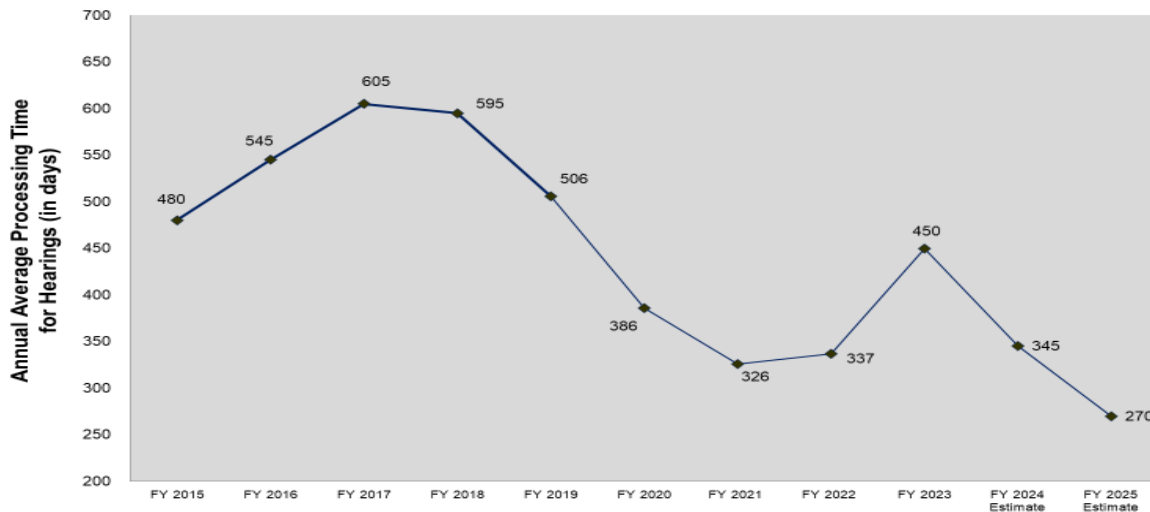
- We are expanding our Health IT partnerships with new Electronic Health Records exchanges and Electronic Records Express, which allows us to obtain medical evidence in a timely manner and utilize our decision support tools.
- We are exploring IT to improve customer service and communications, including email; text messaging; automated reminders; Voice Over Internet Protocol, which allows staff to use their laptops to hold calls with customers; and MicroStrategy, the management information (MI) software tool used to analyze all DDS information collected in DCPS2.
- By the end of 2025, we plan to achieve an average processing time for initial disability claims of 215 days, and decide 92 percent of pending initial disability claims that begin the fiscal year 180 days old or older.

## **Eliminating the Disability Hearings Backlog**

In FY 2022 and FY 2023, in support of our plan to eliminate the backlog, we hired administrative law judges (ALJ) for the first time since FY 2018 and legal assistants to prepare for an expected uptick in the hearings workload and to improve scheduling of hearings. We experienced a temporary increase in the average processing time in FY 2023, as we prioritized individuals waiting the longest and those who chose to wait for an in-person hearing rather than accepting a video or telephone hearing when our hearing offices were closed to the public during the pandemic.

We anticipate eliminating the backlog and achieving a 270-day monthly average wait time by the end of FY 2024. The Budget will allow us to ensure sufficient staffing for our hearings operation to prevent the recurrence of the hearings backlog and maintain an annual average wait time of 270 days (see Figure 11).

**Figure 11: Hearings Wait Times, FY 2015-FY 2025**



## Accomplishments

In FY 2023, we:

- Reduced our pending number of hearings to below 322,000 cases in September 2023 from the peak of over 1.1 million cases in September 2017; and
- Reduced the monthly average wait time for a hearing to 458 days in September 2023 from the peak of 633 days in September 2017.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Eliminate the hearings backlog by the end of FY 2024 and use efficient, modern business processes to make fair, policy-compliant disability decisions; and
- Enhance our Hearings and Appeals Case Processing System (HACPS) to improve service, in-line quality, and efficiency in our hearings process.

## *Improving National 800 Number Service*

Our National 800 Number representatives provide a variety of services, including:

- Answering a broad range of Social Security and Medicare questions;
- Scheduling appointments with our field offices;



- Providing status updates on current claims or appeals; and
- Ensuring the accuracy of our records.

Millions of people depend on our National 800 Number technicians to answer important questions. Our outdated phone systems have frustrated the public and our telephone agents with increased busy signals and dropped calls. Hiring challenges and high attrition have also affected service and caused long waits. Our efforts to modernize our phone system, which began in FY 2019, were interrupted by the pandemic. We implemented an interim system to maintain our National 800 Number; however, the interim system had limitations that resulted in poor service over the last few years.

In early FY 2024, we worked with our contractor to roll out a new modernized system, the Next Generation Telephony Project (NGTP), and transitioned our National 800 Number service to this new platform. We expect NGTP to reduce customer wait times and improve service by providing stable, reliable, and accessible phone service to the public. Features such as estimated wait time and call back assistance will provide our customers with a better customer experience. Successful implementation of NGTP virtually eliminated busy rates starting in November 2023, a tremendous achievement since our customers had been facing high busy rates prior to implementation.

In FY 2023, we hired more teleservice representatives and improved training to help us serve the public. We expect to reduce our average speed of answer from 36 minutes in FY 2023 to 32 minutes in FY 2024, and our busy rate from 8 percent in FY 2023 to 2 percent in FY 2024. However, with level funding or below expected in FY 2024, we froze hiring, which will reverse the progress we made with teleservice center staffing in FY 2023.

The Budget will help us restore staffing levels and improve performance, although it will take time for the new hires to become trained and proficient. We remain confident that our continued systems improvements will improve our performance. Our FY 2025 goal is a 12-minute average speed of answer, an ambitious target, and a 1 percent busy rate (see Figure 12). We expect our FY 2025 hires will further improve our wait times in FY 2026 as we work towards providing quicker service.

## **Accomplishments**

In FY 2023, we:

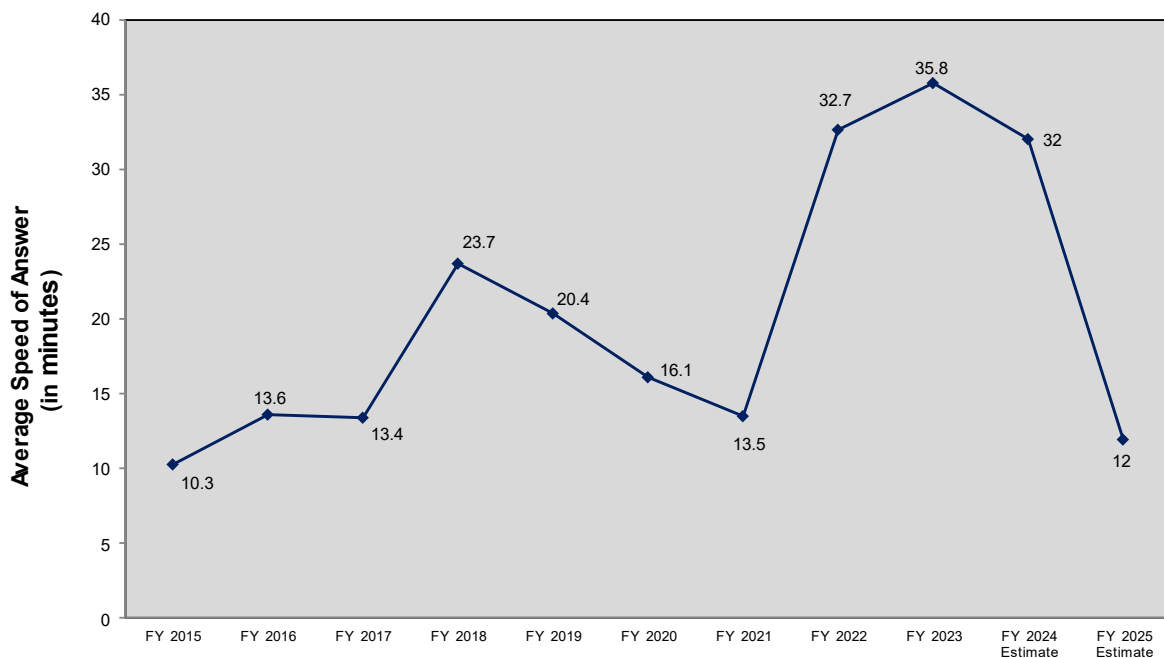
- Handled about 30 million calls on our National 800 Number, including self-service calls; and
- Prepared to implement our new phone system.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Reduce wait times for our customers by over 20 minutes;
- Leverage NGTP to provide estimated wait time and call back options to our customers; and
- Increase newly hired agent performance by improving our training processes and telephone platform.

**Figure 12: National 800 Number Wait Times, FY 2015-FY 2025**



## *Strengthening Service in Our Field Offices*

Our field offices are critical for providing direct service to individuals seeking in-person assistance. Our representatives provide a broad range of services including, for example:

- Initiating and processing benefit claims and appeals;
- Handling post-entitlement events such as changes to beneficiary information, benefit verifications, and improper payment resolutions;

- Processing applications for Social Security cards;
- Enrolling people in Medicare; and
- Confirming benefit eligibility, a critical role in fulfilling our stewardship responsibilities.

In FY 2023, we hired customer service representatives to help us serve the public timely. The Budget will allow us to invest in our field office staff after a hiring freeze this year. We will invest in IT modernization to expand online services and provide our employees with user-friendly systems and tools to perform their work. We are improving CX in our field offices by expanding enumeration self-scheduling, implementing additional self-scheduling options, and providing options that will make visits easier, such as an enhanced mobile check-in application.

## Accomplishments

In FY 2023, we:

- Allowed visitors to check-in for in-office service using their personal mobile device through our Mobile Visitor Intake Process Check-In system. Visitors can use this service for appointments and non-appointment check-ins. The system includes email and text message communication to the visitor's mobile device. The public can elect to receive email and text reminders for both telephone and in-office appointments. In addition, we launched a QR Code mobile check-in service;
- Implemented an interactive online scheduling application (i.e., ESS) for both original and replacement Social Security cards, the first-time customers can self-schedule an appointment;
- Implemented our 21st Century PolicyNet<sup>20</sup> proof of concept in June 2023, taking advantage of in-house cloud-based tools to demonstrate the key features of PolicyNet in a scalable enterprise platform; and
- Improved the Consolidated Claims Experience (CCE) product, which is a holistic, integrated platform to assist employees in processing claims.

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<sup>20</sup> PolicyNet is an SSA Intranet website which provides employees with a one-stop resource for policy and information to administer our programs.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Allow the public to use their mobile devices to schedule appointments with us to apply for benefits. Consolidate our scheduling system to reduce the overhead required to manage and maintain redundant systems;
- Update the 21st Century PolicyNet product to allow all frontline employees access to important policy details from within programmatic applications; decrease time spent searching for and interpreting policies; and improve accuracy of employee work; and
- Expand our use of electronic document upload to allow customers to complete SSA forms online and electronically sign forms through *my Social Security*, reducing their need to come into a field office.

## *Addressing Processing Center Backlogs*

Our PC technicians process the most complex benefit payment decisions; adjudicate benefit payment after appeals decisions; determine and collect debt; correct records; apply benefit offsets; perform stewardship work, and complete other post-entitlement actions.

Our PC staff remain focused on addressing a backlog of pending actions that reached about 4.6 million through FY 2023. The PCs have experienced high staff attrition in recent years. Employees that were hired in FY 2023 are undergoing training and mentoring and are not yet fully productive. Our Budget will allow us to resume our hiring efforts and restore staffing to FY 2023 levels after a hiring freeze in FY 2024. We plan to work towards decreasing our PC technicians' processing time for incoming actions, improving payment timeliness, implementing automation to eliminate duplicate work such as through robotic process automation (RPA) software, and addressing pending actions by maximizing our processing capacity across our PCs.

## Accomplishments

- In FY 2023, we used RPA software to automate high volume, labor-intensive, or repeatable tasks, allowing employees to focus their efforts on more complex actions. Approximately 2,635 users utilized bots an average of 26,500 times per week.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Transfer workloads across our eight PCs to maximize processing capacity and assist in processing the oldest pending cases across all workloads; and

- Expand our use of robotic processes to automate additional workloads, prioritizing those that will have the biggest impact on reducing improper payments.

## ***Modernizing Our Information Technology***

Our technology modernization investments focus on simple, seamless, and secure service by delivering customer-centric digital capabilities with human-centered design, business intelligence, and mobile accessible platforms. We will implement digital services that focus on enhancing CX and removing barriers to service to meet the needs and preferences of our customers, partners, and employees. We are prioritizing self-service options to improve customer service while reducing manual work completed by frontline staff.

In FY 2024 and beyond, we plan to increase self-service options on *my Social Security*; simplify the online SSI application; and implement an end-to-end mobile-friendly electronic document and evidence service that allows customers to complete, sign, and submit SSA forms and documents online. We will eliminate the need for our employees to manually process mail by continuing efforts to centralize incoming mail, digitize evidence for processing, and use a robust workload control system. We also will consolidate and modernize our systems to help us adapt to future needs and automated processes.

## ***Accomplishments***

In FY 2023, we:

- Added electronic notices in *my Social Security* that customers can choose to receive electronically. As of September 2023, 8.7 million users have chosen the electronic notices option;
- Gave individuals the ability to track the status of their pending retirement, survivors, Medicare, disability, and aged claims and appeals online instead of having to call or visit a field office. The tracker indicates specifically which step in the decision process their claim is currently, general overall time expectations as well as expected times in each step, and in some situations, contact information for the office where they can direct questions;
- Expanded the Analytics and Disability Decision Support/IMAGEN system, which provides modern analytic tools that enable faster and easier reviews of lengthy medical record content, to 130 offices across all 50 States and Washington, D.C. We have processed over 40 million evidence documents and reviewed over 650,000 claims with IMAGEN;
- Developed the Hearing Recording and Transcription (HeaRT) infrastructure, which will ultimately eliminate the use of legacy technology, to save costs and maximize flexibility

for hearing participants. It will produce an accurate and automated transcription to assist with drafting decisions; and

- Began developing and testing parts of our SSI Application Simplification initiative.

## **Major Initiatives**

In FYs 2024 and 2025, we plan to:

- Consolidate our benefits legacy mainframe systems and over 100 separate regional applications into a single universal benefits processing experience, the Consolidated Claims Experience system, to support the claims-taking and post-entitlement or post-eligibility process through the lifecycle of a claim for benefits;
- Develop and implement a simplified SSI application;
- Reduce the burden on the public by eliminating requirements to present original documents or sign documents, and offering electronic signing options;
- Expand rollout of HeaRT to improve quality and efficiency in our hearings process;
- Sunset legacy applications and improve efficiencies of our code; and
- Use VoC feedback to develop and implement human-centered design solutions to address customer pain points and improve customer satisfaction.

## **STRATEGIC GOAL 2: *BUILD AN INCLUSIVE, ENGAGED, AND EMPOWERED WORKFORCE***

Our employees are the heart of the agency; we strive to foster an environment that allows them to develop and succeed. Increasing demands on a declining number of staff has reduced morale, which we saw in our Federal Employee Viewpoint Survey (FEVS) results. Our Human Resources analyses demonstrated SSA's FEVS scores were among the highest in Federal government when our funding and staffing were sufficient. After a decade of insufficient funding, we scored among the lowest for the largest agencies in FY 2023.

Our employees work extremely hard to serve the public and provide the best customer service possible. The increase in pending cases and wait times frustrates our customer-focused employees. While technology has helped us serve more beneficiaries than ever, we must find a way to replace the staff necessary to complete our complex workloads. We are empowering our workforce and ensuring inclusion, fairness, accessibility, and equity. We are implementing a comprehensive human capital strategy that focuses on addressing acute near-term recruitment and retention challenges, while also focusing on longer term activities that will strengthen our workforce over time.

### ***Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement***

A well-trained, dedicated workforce that reflects the diversity of our customers is essential to accomplishing our mission. Our goal is to improve policies and practices to maintain a representative workforce, including identifying and fostering talent, announcing vacancies using various methods, supporting new members of the workforce, educating managers about bias to ensure fair promotion processes, addressing potential barriers in accessing job opportunities, removing technological and other barriers for employees with disabilities, and complying with laws and regulations related to [Section 501 of the Rehabilitation Act of 1973](#) and [Architectural Barriers Act Accessibility Standards](#).

We are expanding manager recruitment capabilities by utilizing OPM special hiring authorities (e.g., direct hiring authority for approved mission-critical vacancies, Schedule A, Pathways, Military Spouse) and using new software platforms for direct outreach to colleges and universities nationwide. We are leveraging partnerships with universities and institutions that specifically work with underserved communities and are providing guidance and program oversight for veteran hiring, training, and retention activities. We are increasing the use of social media platforms to recruit students, recent graduates, and direct hire applicants and attract top talent from anywhere in the country. We also are seeking opportunities to increase internships and develop student interest in SSA careers.



## Accomplishments

In FY 2023, we:

- Published the [FYs 2023-2026 Human Capital Operating Plan](#) (HCOP) in September 2023. The HCOP represents our commitment to ensure that all employees have the tools, resources, and skills needed to serve the public. The HCOP is reflective of our cross-agency collaboration and centers around three Human Capital Strategic Goals: (1) Transform SSA into an Employer of Choice; (2) Improve Workplace Conditions to Drive Engagement; and (3) Invest in Learning and Development;
- Used contractors to support existing staff in ongoing workforce planning analysis and to support the administration of our agency-wide inaugural FY 2023 Core and Leadership Competency Assessment to identify skill gaps for future training and career development opportunities outlined in the FYs 2023-2026 HCOP;
- Hired over 700 veterans and developed a Veterans New Hire website, which includes links to financial resources and benefits available to veterans; and
- Conducted diversity training for managers to increase recruitment efforts of underrepresented talent, using Handshake.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Release and enhance the Civil Rights and Diversity Empowerment Portal, a consolidated equal opportunity training site for our non-managers, managers, and Equal Employment Opportunity (EEO) practitioners. We will implement DEIA strategies, policies, practices, and processes to identify and eliminate barriers in hiring and advancement;
- Develop a comprehensive Historically Black Colleges and Universities (HBCU) Outreach Best Practices and Lessons Learned Guide, elevating our engagement strategies. Additionally, we plan to boost HBCU recruitment and attendance at career events by 10 percent compared to the FY 2023 benchmark;
- Support hiring opportunities and paid internships that provide meaningful work experiences to students by hiring approximately 1,500 interns in FY 2025; and
- Improve accessibility to employees with disabilities; enhance data collection and analysis of reasonable accommodations (RA) requests to inform agency RA policies; and increase function, evaluation, and compliance with [Architectural Barriers Act Accessibility Standards](#) and [Section 501 of the Rehabilitation Act of 1973](#).

## ***Support Employees' Chosen Career Paths***

We acknowledge our employees' abilities and encourage them to pursue their chosen career paths by fostering an engaging workplace environment and by providing training and development opportunities. Developing our employees begins with leadership, which is why we are committed to investing in ongoing training and development opportunities for managers. Giving managers foundational tools to perform their responsibilities positions them to train and manage the performance of their staff, enhance employee engagement, increase productivity, and improve retention. We must ensure resources are available for frontline supervisors with training focused on employee communication, mentorship, and equity. In addition, we are providing opportunities for employees at all levels to participate in development programs that will broaden their skills and prepare them for the next step in their career paths.

### **Accomplishments**

In FY 2023, we:

- Implemented mini-flash mentoring events for over 5,000 employees on career development, interpersonal skills, and soft skills with a 96 percent participant satisfaction rate;
- Adopted an efficient and effective succession planning business process, using an automated tool (wePrepare) that allows for agency-wide data collection, reporting, and collaboration;
- Held two Virtual Career Enrichment Workshops for over 1,000 participants. These workshops provide personal and professional enrichment and growth through training on SSA's core and leadership competencies;
- Scheduled and administered 175 virtual training classes for almost 4,000 agency employees including Project Management, Analyst Curriculum, Professional Development, and Contracting Officers Representative;
- Completed first developmental assignment and executive-level training for the Senior Executive Service (SES) Candidate Development Program (CDP) to ensure a pipeline of ready successors for critical SES positions;
- Launched the National Leadership Development Program (NLDP) Preparatory Series to train prospective applicants on how to apply for the NLDP; and
- Achieved an average post-training assessment score of 90 percent among Reaching Every Supervisor or Leader Very Early (RESOLVE) participants who rated their post-training knowledge as either "adequate" or "high." RESOLVE is a training initiative to provide proactive training to managers on issues such as time and attendance, performance

management, and other common issues managers regularly face. The score represents an average 25 percentage point increase in reported knowledge levels between pre-and post-training assessments.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Enhance our educational series, to include quarterly training and continuation of the SES CDP preparatory series, designed to prepare prospective applicants for the CDP application process;
- Announce a re-engineered NLDP opportunity for employees agency-wide;
- Implement an updated agency-level *Improve Workplace Morale* plan, spanning FYs 2024–2025, and component-level plans to serve as roadmaps for change and improvement in the areas of employee morale, recruitment, and retention;
- Share agency-wide best practices, tools, and strategies to address employee career path resources, development opportunities, and workplace flexibilities;
- Update our supervisory records application (*e7B*) to keep pace with changes to agency system and security policies, provide a more intuitive user experience for supervisors and employees, and improve supervisors' compliance with performance management timelines; and
- Implement Leadership Fundamentals, a multi-year online and self-paced curriculum that provides sequential training for managers within the first three years of their supervisory roles. The curriculum includes personnel management, labor and employee relations, managing a diverse workplace, managing performance, and health and safety training.

## **STRATEGIC GOAL 3: *ENSURE STEWARDSHIP OF SSA PROGRAMS***

### ***Improve the Accuracy and Administration of Our Programs***

Eligible customers receiving the correct benefit amount is fundamental to our mission. We pursue opportunities to improve payment accuracy and prevent improper payments through enhanced technology, data analyses, and fraud prevention, while ensuring we provide our customers with the services and resources they need. We will work with and assess our collaboration with institutions and contractors to reduce barriers in government contracting and grant opportunities.

#### ***Supporting Our Cost-Effective Program Integrity Work***

Our funding request helps ensure individuals receive the benefits to which they are entitled and safeguards the integrity of benefit programs by confirming eligibility, improving payment accuracy for both overpayments and underpayments, and preventing fraud. PI funding allows us to conduct our legally required eligibility reviews such as CDRs and SSI redeterminations; supports our anti-fraud CDI program; and funds special attorneys for fraud prosecutions.

The Budget assumes PI funding levels set forth in the FRA in both FYs 2024 and 2025. With this funding, we will process 575,000 full medical CDRs in each of these years. The Budget will allow us to eliminate the CDR backlog in FY 2026 and prevent a new backlog from forming. We will also process around 2.5 million SSI non-medical redeterminations in FY 2024 and FY 2025. For additional details please see our PI exhibit in the LAE section.

#### ***Enhancing Our Payment Accuracy Efforts***

We are committed to reducing improper payments for each program, especially to ensure that we pay eligible individuals the correct amounts on time. Our commitment to improve the integrity of our programs includes reducing overpayments and underpayments through streamlining our policies and procedures, automating our business processes, and leveraging data through exchanges with other entities. We perform quality reviews, conduct training, and promote timely reporting by beneficiaries. We established an executive-led Overpayment Review Team to conduct a holistic assessment of how our administrative procedures influence our overpayment processes. We are pursuing both regulatory and non-regulatory changes to simplify our policies, which should result in fewer improper payments. In addition, we are adding automated programs to reduce manual data entry and error.

While our payment accuracy rates are high, even small error rates add up to substantial improper payment amounts given the magnitude of the benefits we pay each year. For instance, in FY 2022, the last year for which we have data, we issued about \$1.3 trillion in benefit payments,

and our combined overpayments and underpayments for OASDI and SSI totaled approximately \$13.6 billion.

Overpayments can occur for many reasons. We handle overpayments on a case-by-case basis given that each person's situation is unique. However, by law, Social Security is required to adjust benefits or recover debts when people receive payments to which they were not entitled.

Wages are a major cause of payment errors, and we continue to make it easier for people to self-report wages. Individuals can report wage information via the myWageReport online application, the automated SSI Telephone Wage Reporting system, or the SSA Mobile Wage Reporting application. The Payroll Information Exchange (PIE) will be a significant step forward in improving customer service and combating improper payments. By receiving payroll information directly from payroll data providers and using that data to automatically adjust benefits, PIE will help prevent overpayments. PIE will help our customers by reducing the responsibility to report wage information. PIE will also help our technicians by eliminating work and time spent obtaining and verifying wage data.

We are working to simplify our overpayment notices so individuals clearly understand the overpayment, as well as available options to repay, appeal, or request a waiver. We tell people to call us if they think they are not at fault for an overpayment of \$1,000 or less, as we may be able to process the request quickly over the phone. In FY 2024, we are identifying, evaluating, and simplifying our overpayment notices and other correspondence. Our initial focus will be on notices that can be quickly updated using one of our automated systems. We will also use a variety of resources to communicate to the public and advocates on improper payment matters, including reminders about reporting responsibilities and waiver and appeal rights. For additional detail and a list of our initiatives, please see our Improper Payments exhibit in the LAE section.

### ***Enhancing Our Fraud Prevention and Detection Activities***

Our PI and payment accuracy efforts include initiatives to combat fraud. For example, our National Anti-Fraud Committee (NAFC) provides a forum for leaders to collaborate and provide guidance on fraud challenges and mitigation opportunities. We have established a robust Enterprise Fraud Risk Management program. We are conducting Fraud Risk Assessments for our major programmatic areas on a regular basis, while providing training to our employees to equip them with tools to effectively prevent, detect, and resolve fraud issues.

Our OGC maintains a robust Criminal Fraud Program in which criminal fraud prosecutors are recruited, hired, and assigned as Special Assistant U.S. Attorneys (SAUSA) to U.S. Attorney's Offices around the country. These SAUSAs work with our OIG and other law enforcement agencies to investigate and prosecute cases of alleged Social Security fraud and related crimes that would not otherwise be prosecuted in Federal courts. Consistent with U.S. Department of Justice priorities, our SAUSAs have expanded their caseloads to include investigating and prosecuting widespread imposter scams and the widespread fraudulent use of stolen SSNs and other personally identifiable information to commit aggravated identity theft, wire fraud, money laundering, and other crimes.

## Accomplishments

In FY 2023, we:

- Conducted a media campaign, with videos on YouTube, social media platforms, and in field offices, to explain the importance of reporting wages and the various options that are available to report;
- Simplified the Request for Waiver of Overpayment Recovery form;
- Initiated a fraud risk profile and completed several fraud risk assessments to ensure the integrity of our programs;
- Revised the NAFC Charter to mandate quarterly meetings and ensure ongoing collaboration as outlined in the Office of Management and Budget (OMB) December 2021 Memo: [\*Promoting Accountability through Cooperation among Agencies and Inspectors General\*](#). We held the Third Annual Anti-Fraud Summit in September 2023. The Summit brought together agency and OIG leadership to address fraud issues facing the agency;
- Provided mandatory anti-fraud training for all employees;
- Updated the Representative Payee System to ensure we perform background checks at least once every five years for all non-exempt representative payees for Social Security beneficiaries; and
- Received the Certificate of Excellence in Accountability Reporting for the 25th year in a row, an unprecedented accomplishment in the Federal Government, which demonstrates our dedication to transparent and accurate financial reporting.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Improve equity in the SSI program by increasing underpayment processing of our oldest and highest priority cases, including those disproportionately impacted by poverty;
- Re-assess fraud risks in the eServices and Administrative programs, and complete the Disability program fraud risk re-assessment and the Enumeration and Debt Management fraud risk profiles;

- Re-assess fraud risks in the Representative Payee and SSI programs; complete the re-assessment of fraud risk in the eServices, Administrative, and Representative Payee programs; and the Disability fraud risk profile;
- Reevaluate the NAFC Charter to ensure it reflects current roles, responsibilities, and agency objectives and initiatives. We will hold mandatory quarterly meetings and the Annual Anti-Fraud Summit;
- Maintain a corps of 35 SAUSAs to deter Social Security fraud, investigate and prosecute individuals who defraud the government, and secure court-ordered restitution for the agency. We will explore opportunities to expand our coverage by having SAUSAs work remotely to prosecute cases in Federal districts adjacent to their home districts; and
- Provide mandatory anti-fraud training for all employees.

### ***Addressing the Climate Crisis***

Our [Sustainability Plan](#) demonstrates our commitment to reducing energy use at our delegated facilities; installing renewable energy technology, such as photovoltaic systems; using as much pollution-free electricity as possible; and reducing emissions from our vehicles and heating plants.

We will transition our vehicle fleet to Zero Emission Vehicles (ZEV) and reduce our carbon footprint and greenhouse gas emissions. We are analyzing our vehicle utilization and eliminating under-utilized vehicles while simultaneously replacing older vehicles with ZEVs. We have started transitioning to the goal of 100 percent acquisition of ZEVs by 2035, including 100 percent light-duty acquisitions by 2027. Our target is to achieve 86 percent ZEV acquisitions in 2025.

### ***Leveraging Artificial Intelligence to Improve Operations***

Consistent with EO 14110, [Safe, Secure, and Trustworthy Development and Use of Artificial Intelligence](#), we acknowledge the need to balance the rapidly evolving nature of technology and artificial intelligence (AI), with national security and potential perils to the public. To satisfy the requirements of the EO, we have officially assigned the role of Responsible AI Official (RAIO) to our Chief Artificial Intelligence Officer (CAIO) and established a Responsible AI (RAI) Core Team, which includes the Acting CAIO and representation from various SSA components. This Core Team will be the first line of review for all things related to AI at our agency. In addition, we are establishing an AI Executive Council to provide strategic leadership and oversight, while ensuring the implementation of AI technology is in alignment with our strategic goals. The RAI



Core Team will develop guidance, policies, and training to use generative AI<sup>21</sup> technology safely and responsibly at the agency.

We introduced a policy to emphasize our commitment to designing, developing, acquiring, utilizing, and evaluating AI in a manner that builds public trust and confidence while safeguarding privacy, civil rights, civil liberties, and American values. The policy defines the scope of AI and sets key principles governing SSA's AI governance. Our policy mandates the annual maintenance and public availability of the agency's current AI inventory on [SSA.gov/data](https://ssa.gov/data). Furthermore, the policy identifies the roles and responsibilities of the RAIIO, various agency components, and members of AI use case teams. Our AI policy outlines the process for integrating new AI use cases and emphasizes ongoing coordination with the agency's Enterprise Risk Management Council, Investment Review Board, and National Anti-Fraud Council for AI governance.

We recognize the opportunities offered by AI, such as increased efficiency, higher quality, more equitable service, and more substantive work for our staff. We will explore ways to responsibly leverage cutting-edge technologies to enhance our operations and improve public service, while engaging in ongoing research to identify suitable use cases for AI and evaluate post-implementation effects. In the interim, we instituted a temporary block on third-party generative AI tools on agency devices to prevent the release of personally identifiable information or other sensitive data, while we develop further guidance, policies, and training to ensure the safe use of AI.

### *Investing in Cybersecurity to Safeguard our Data*

We are implementing the cybersecurity measures under EO 14028, [Improving the Nation's Cybersecurity](#). Maintaining the public's trust in our ability to protect sensitive data requires advanced cybersecurity controls, constant assessment of the threat landscape, and continual enhancements to our cybersecurity program. We must be vigilant and protect against network intrusions and improper data access by strengthening our defensive cyber capabilities, detecting threats quickly, sharing cyber threat information with our Federal and industry partners, and making new investments to mature and expand our Zero Trust Architecture. For additional details, please see our IT exhibit in the LAE section.

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<sup>21</sup> Generative AI refers to algorithms used to create new content, including audio, code, images, text, simulations, and videos, based on the data they were trained on.



## **Accomplishments**

In FY 2023, we:

- Enhanced our security controls to address the risks inherent in our legacy applications, ensuring continuous monitoring, a comprehensive integrity review process, and employee access to only the resources that are appropriate for their job function;
- Received support from the Technology Modernization Fund to accelerate Multi-Factor Authentication (MFA) to improve our security posture and reduce risks from compromised credentials; and
- Evolved the agency's Integrity Review application to a cloud-based infrastructure, improving the application's security posture and enhanced analytics capabilities.

## **Major Initiatives**

In FYs 2024 and 2025, we plan to:

- Update privacy protection and compliance training for employees based on their roles within the agency;
- Accelerate phishing-resistant MFA for all internal agency systems, which will strengthen protections for our customers' sensitive data; and
- Build upon our cybersecurity efforts with both short-term and long-term authentication strategies that incorporate market innovation and data-driven, secure, and privacy-enhancing solutions to protect individuals and prevent fraud. We will establish services that offer the highest authentication security on the market, support an omni-channel service approach, reduce operational costs, and provide access for all individuals who wish to conduct online business with the agency.

## ***Identify and Eliminate Potential Barriers to Accessing Contracts and Grants***

Our goal is to ensure equitable access to contracting and grant opportunities for underrepresented groups and research institutions serving people of color. To achieve our goal, we are devising best practices to encourage participation by HBCUs and institutions serving students of color (ISSC), including direct communications with professional associations. We will meet with HBCUs and ISSCs to learn more about their experience with our grantmaking process, potential barriers within the process, and suggestions for eliminating barriers. Additionally, we will develop best practices to secure contracts with qualified Historically Underutilized Business (HUB) Zone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses. We will

meet with bidders and recipients of our contracts for HUBZone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses to learn about their experiences with our procurement process, barriers they encountered, and recommended solutions to eliminate these barriers.

## **Accomplishments**

In FY 2023, we:

- Created a Listserv of contacts at various ISSCs and professional organizations with the goal of engaging directly with individuals with interest in our research programs;
- Announced the Retirement and Disability Research Consortium (RDRC) funding opportunity and sent the Request for Applications to the newly created Listserv to notify potential applicants. We held two information sessions on the RDRC geared towards assisting applicants unfamiliar with the application process and have taken steps to make our review processes more equitable;
- Created language for a Small Business Evaluation Factor to use in our General Services Administration (GSA) Schedule procurements;
- Upgraded the Small Business Forecasting tool, on our public-facing [Office of Small and Disadvantaged Business Utilization webpage](#), to provide more timely and robust information to small businesses; and
- Received a score of “A” from the Small Business Administration (SBA) for increasing our contracting with small businesses and small disadvantaged businesses.

## **Major Initiatives**

In FYs 2024 and 2025, we plan to:

- Track changes in the number of applications and proposals submitted to us by, and the percentage of research grants and procurement opportunities we award to, HBCUs, ISSCs, and small and disadvantaged businesses to evaluate and improve our outreach and engagement efforts and ensure access to our research grants and procurement opportunities;
- Maximize use of the Listserv and seek opportunities to engage with the ISSC research community;
- Partner with other agencies to identify best practices for increasing participation by HBCUs and ISSCs in grant, cooperative agreement, and contracting opportunities;

- Work with the SBA Procurement Center Representative to identify contractors who can meet our needs and help us ensure equity for underrepresented groups;
- Conduct monthly outreach meetings with the vendor community to discuss upcoming contracting opportunities and help small businesses, including HUBZone businesses and other disadvantaged businesses, find possible subcontracting opportunities; and
- Implement language for a Small Business Evaluation Factor to use in our GSA Schedule procurements.

## ***Improve Organizational Performance and Policy Implementation***

We are advancing administrative actions to simplify the SSI program, improve case processing, and leverage partnerships to reduce burden on our customers and improve customer service.

### ***Simplify Our Policies and Procedures***

Our disability determinations process continues to result in decisions in line with our statute, and we continue updates to keep pace with modern medicine and technological advancements in healthcare. We will make evidence-based decisions guided by available science and data, collect data where it is lacking, and improve our capacity to develop and implement evidence-based policies across our programs.

### ***SSI Simplification***

We are revising our regulations and simplifying policies and business processes to make applying for SSI less burdensome for people, especially individuals facing barriers to accessing our services. We are using user-centered design to streamline the SSI application.

In August 2023, we updated our policies on the temporary institutionalization (TI) benefits policy, which allows for the continued receipt of SSI payments while in a medical facility for an extended period of time that does not exceed 90 days. We also created and implemented Form SSA-186: Temporary Institutionalization Statement to Maintain Household and Physician Certification. These changes make it easier for recipients facing barriers, representative payees, and medical institutions to provide the documentation necessary for obtaining TI benefits.

We are working on regulations to simplify our In-Kind Support and Maintenance (ISM) policy. ISM is unearned income in the form of food and shelter and can affect the SSI benefit amount. In FY 2023, we published three NPRMs that will omit food as a source of ISM, expand the rental subsidy exception policy nationwide, and expand the definition of Public Assistance Household. We plan to publish the final rules in FY 2024.

## ***Disability Determination Case Processing Enhancements***

We are improving disability case processing and hearings and appeals case processing systems through our enterprise-wide efforts to develop and implement modern, national claims processing systems. The two systems will seamlessly interact with each other from initial claim filing through a final appeal decision. In FY 2023, we supported ongoing DCPS2 operations and introduced capabilities to reduce dependency on inefficient and outdated software applications. We eliminated all remaining exclusion scenarios, and all new cases are now being worked in DCPS2.

All DDSs and Federal disability processing components are using DCPS2, which now supports initial and reconsideration disability case processing across the agency. Out of 52 DDSs, 50 are using DCPS2 exclusively, and 48 have decommissioned their legacy systems. As of December 2023, DCPS2 has received 11.1 million claims and has processed 8.7 million claim determinations.

We are bringing decision support tools to many aspects of the disability determination process to improve decisional accuracy and policy compliance.

## ***Hearings and Appeals Case Processing System***

HACPS facilitates end-to-end hearings case development, includes robust MI reporting, and supports the retirement of outdated legacy applications. In FY 2023, we mandated the use of HACPS in 100 percent of hearing offices and national hearing centers and reduced reliance on legacy systems by implementing functionality associated with receipt, workup, scheduling, and case closure.

## ***Expand Strategic Partnerships with External Partners***

Our programs are a gateway to accessing other benefit programs such as Medicare and Medicaid. By taking advantage of data exchanges with other Federal and State agencies, we will increase the accuracy of our records, improve CX, and increase organizational effectiveness. We will also leverage relationships with other Federal, State, and private partners to identify ineligible individuals who obtain Social Security and SSI payments.

We collaborated with Treasury and OMB to start a data exchange and reimbursable statutory agreement that allows us to provide State death data to Treasury for their Do Not Pay (DNP) system with the goal of preventing improper payments to deceased individuals. We delivered the State death information to DNP on December 27, 2023.

We are developing PIE to prevent overpayments by allowing us to electronically access wage and employment data directly from payroll providers for individuals who authorize us to obtain it.

We are working with the Centers for Medicare and Medicaid Services to increase collection and sharing of our existing race and ethnicity data. We already share our enumeration data, with plans to increase the voluntary collection of race and ethnicity data as outlined in our [Equity Action Plan 2023 Update](#). As of December 2023, nine States/territories have agreed to participate in our initiative to include race and ethnicity data through Enumeration at Birth. We use race and ethnicity information for research and statistical purposes only, to help ensure all SSA customers are treated equitably.

## Accomplishments

In FY 2023, we:

- Published three NPRMs that will simplify ISM policy:
  - Omitting Food from ISM: The proposed rule would remove food as a source of ISM, so that food assistance received from others does not impact claimants' benefit eligibility and amounts. We also proposed to add conforming language to our definition of income, excluding food from the ISM calculation.
  - Expanding the Definition of a Public Assistance Household: The proposed rule would expand the definition of a public assistance household to include the Supplemental Nutrition Assistance Program as an additional means-tested public income maintenance program. We also requested public comment on expanding the definition to include households in which *any other* (as opposed to *every other*) member receives public assistance. When other household members receive assistance, we assume that they need their income to support their own needs and do not subject the SSI claimant to ISM or deeming.
  - Expanding the Rental Subsidy Policy: The proposed rule would expand nationwide the rental subsidy exception in effect in seven States, exempting claimants from ISM in the form of room or rent if the amount they pay in rent equals or exceeds the presumed maximum value or current market rental value, whichever is less.
- Achieved national implementation of DCPS2 in the State DDSs and mandatory use of HACPS in our hearings offices to improve consistency and quality of our disability processes; and
- Conducted pre-implementation development of PIE by creating wage-reporting notices specific to the exchange, updating existing authorization receipt language, and creating special alerts for cases that require manual review by a technician.

## Major Initiatives

In FYs 2024 and 2025, we plan to:

- Release our online SSI benefits application;
- Publish final regulations that will help us simplify our programs, improve service, and reduce improper payments;
- Improve data collection for program data on race and ethnicity so we can examine whether our programs are equitably serving our applicants and beneficiaries;
- Automate wages received from payroll data providers through PIE, refining the use of third-party data and reducing manual workloads; and
- Develop enhancements to improve the quality and efficiency of our DCPS2 processes, which will help us reduce the disability claims backlog.

## **OTHER ADMINISTRATION INITIATIVES: *LOOKING TOWARD THE FUTURE***

### **Protects the Social Security Benefits that Americans Have Earned**

The Administration is committed to protecting and strengthening Social Security and opposes any attempt to cut Social Security benefits as well as proposals to privatize Social Security. The Administration believes that protecting Social Security should start with asking the highest-income Americans to pay their fair share. In addition, the Administration supports efforts to improve Social Security benefits, as well as Supplemental Security Income benefits, for seniors and people with disabilities, especially for those who face the greatest challenges making ends meet.

### **Provides National, Comprehensive Paid Family and Medical Leave**

The vast majority of America's workers do not have access to employer-provided paid family leave, including 73 percent of private sector workers. Among the lowest-paid workers, who are disproportionately women and workers of color, 94 percent lack access to paid family leave through their employers. In addition, as many as one in five retirees leave the workforce earlier than planned to care for an ill family member, which negatively impacts families, as well as the Nation's labor supply and productivity. The Budget proposes to establish a national, comprehensive paid family and medical leave program administered by SSA. The program would: provide workers with progressive, partial wage replacement to take time off for family and medical reasons; include robust administrative funding; and use an inclusive family definition. The Budget would provide up to 12 weeks of leave to allow eligible workers to take time off to: care for and bond with a new child; care for a seriously ill loved one; heal from their own serious illness; address circumstances arising from a loved one's military deployment; or find safety from domestic violence, sexual assault, or stalking —otherwise known as “safe leave.” The Budget would also provide up to three days to grieve the death of a loved one. The Administration looks forward to continuing to work with the Congress to make this critical investment and strengthen America's economy.

### **Extends Supplemental Security Income to the U.S. Territories**

As noted in the Budget, the Administration looks forward to improving the Supplemental Security Income program to help low-income older Americans and people with disabilities afford their basic needs. This includes working with Congress to extend SSI eligibility to Puerto Rico and the U.S. Territories, providing parity with the rest of the United States.

### **Authorizes SSA to refer Social Security Disability Insurance and Supplemental Security Income beneficiaries to State Vocational Rehabilitation Services**

The Budget proposes increasing beneficiaries' access to vocational rehabilitation services, particularly for SSI transition-age youth who are not eligible for services through the Ticket to Work program. The Budget assumes that SSA will only make referrals upon the State agency's request and that beneficiaries' participation would be voluntary.



