

CONTENTS

APPROPRIATION LANGUAGE/BACKGROUND	89
Authorizing Legislation	89
Appropriation Language	90
Language Analysis	93
Significant Items in Appropriations Committee Reports.....	97
Improper Payments	106
Pilot Programs.....	109
Consultative Exams	113
Appropriation History	116
SSA-Related Legislation From April 2023 to March 2024	121
GENERAL STATEMENT/BUDGETARY RESOURCES/PERFORMANCE.....	122
Limitation On Administrative Expenses Overview	122
Key Priorities	123
Size and Scope of Our Programs	125
Funding Request	126
All Purpose Table	128
SSI State Supplementation/Impact of States Dropping Out	130
Budget Authority and Outlays	132
Amounts Available for Obligation/Analysis of Changes	135
Summary of Change in Administrative Budget Authority	137
Summary of Change in Administrative Obligations from FY 2024 to FY 2025.....	138
Budgetary Resources by Object.....	140
Estimated Distribution of Agency Costs.....	141
Workload Processing and Cost Distribution Across the Organization.....	144
Performance Targets	146
Program Integrity	148
Fiscal Year 2023 Disability Decision Data.....	153
Priority Goals	154
Customer Experience	155
Advancing Equity, including Diversity, Equity, Inclusion, and Accessibility (DEIA) in the Workforce, and Conducting Outreach to People Potentially Facing Barriers	158
Information Technology	169
SSA Organizational Chart.....	193

Limitation on Administrative Expenses

Major Building Renovations and Repair Costs	194
Social Security Advisory Board.....	201

TABLES

Table 3.1—Authorizing Legislation	89
Table 3.2—Appropriation Language Analysis	93
Table 3.3—Significant Items in Appropriations Committee Report	97
Table 3.4—FY 2023 Consultative Examination Counts and Cost Data.....	113
Table 3.5—Appropriation History Table.....	116
Table 3.6—Benefit Outlays	125
Table 3.7—Beneficiaries	125
Table 3.8—Budgetary Request.....	126
Table 3.9—All Purpose Table (APT)	128
Table 3.10—State Supplement Payments.....	130
Table 3.11—SSI User Fee Collections	130
Table 3.12—Estimated SSA User Fee Collections by State.....	131
Table 3.13—Budget Authority and Outlays	132
Table 3.14—Amounts Available for Obligation	135
Table 3.15—Summary of Change in Administrative Budget Authority from FY 2024 to FY 2025.....	137
Table 3.16—Summary of Change in Administrative Obligations from FY 2024 to FY 2025	138
Table 3.17—Budgetary Resources by Object.....	140
Table 3.18—FY 2023 - Estimated Distribution of Agency Costs	141
Table 3.19—FY 2024 - Estimated Distribution of Agency Costs	142
Table 3.20—FY 2025 - Estimated Distribution of Agency Costs	143
Table 3.21—Key Performance Targets	146
Table 3.22a—Program Integrity Workloads and Funding by Source – 10-Year	149
Table 3.22b—Program Integrity Workloads and Funding by Source	150
Table 3.23—Fiscal Year 2023 Disability Decision Data.....	153
Table 3.24—Total Information Technology Systems (ITS) Budget Authority.....	169
Table 3.25—Modernization Cost Avoidance and Efficiencies	170
Table 3.26—Appendix A: FY 2025 Agency IT Portfolio Summary.....	186
Table 3.27—FY 2025 Agency IT Portfolio Summary	190
Table 3.28—Appendix B: Total Agency Cybersecurity Spend FY 2025 President's Budget.....	191
Table 3.29—Total Agency Cybersecurity Spend (Non-IT Cost)	192
Table 3.30—Total Agency Cyber Human Capital Spend	192

Limitation on Administrative Expenses

Table 3.31—Total Agency Cybersecurity Spend	192
Table 3.32—FY 2023 Physical Infrastructure Costs by Component	196
Table 3.33—FY 2024 Estimated Physical Infrastructure Costs by Component	197
Table 3.34—FY 2025 Estimated Physical Infrastructure Costs by Component	198
Table 3.35—FY 2023 Physical Infrastructure Costs by Region.....	199
Table 3.36—FY 2024 Estimated Physical Infrastructure Costs by Region.....	199
Table 3.37—FY 2025 Estimated Physical Infrastructure Costs by Region.....	200
Table 3.38—Obligations by Object Class and Staffing	202

APPROPRIATION LANGUAGE/BACKGROUND

AUTHORIZING LEGISLATION

The LAE account is authorized by section 201(g) of the Social Security Act. The authorization language makes available for expenditure, out of any or all of the Trust Funds, such amounts as Congress deems appropriate for administering Title II, Title VIII, Title XVI, and Title XVIII of the Social Security Act for which we are responsible and Title XVIII of the Act for which the Secretary of the Department of Health and Human Services is responsible.

Table 3.1—Authorizing Legislation
(Dollars in thousands)

	2023 Amount Authorized	2023 Enacted^{1,2}	2024 Amount Authorized	2024 Estimate^{3,4}	2025 Amount Authorized	2025 Estimate^{5,6}
Title II, Section 201(g)(1) of the Social Security Act	Indefinite	\$14,126,978	Indefinite	\$14,193,978	Indefinite	\$15,401,924

¹ Consolidated Appropriations Act, 2023 (P.L. 117-328). The total includes \$55,000,000 in available funding through September 30, 2024, for activities to address the disability hearings backlog within the Office of Hearings Operations. The total also includes \$1,784,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and a \$1,511,000,000 allocation adjustment to remain available for 18 months through March 31, 2024. P.L. 117-328 allows us to transfer up to \$15,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units.

² The total also includes \$140,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

³ A full-year appropriation was not enacted at the time the FY 2025 President's Budget was prepared. The FY 2024 figures assume funding at the annualized funding level provided by a full-year Continuing Resolution (CR) for regular LAE. 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. The SSA Congressional Justification assumes a \$19.1 million transfer from the LAE account to the OIG for costs associated with jointly operated CDI unit costs in FY 2024, the same level as the 2024 Budget. See the Program Integrity exhibit in the LAE section for more information. Further, the FY 2024 CR funding level includes \$55,000,000 to address the disability hearings backlog, which is included in regular LAE.

⁴ The total also includes \$140,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

⁵ The FY 2025 Budget proposes \$1,903,000,000 in dedicated program integrity funding, including \$273,000,000 in base funding and a \$1,630,000,000 cap adjustment, to remain available until March 31, 2026. The Budget proposes transferring \$19,600,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The FY 2025 Budget also includes \$50,000,000 to remain available until expended to modernize our benefits system. The FY 2025 budget also includes \$2,000,000 for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure available through September 30, 2026, of which \$700,000 is for the OIG for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure.

⁶ The total includes up to \$170,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

Limitation on Administrative Expenses

APPROPRIATION LANGUAGE

For necessary expenses, including the hire and purchase of passenger motor vehicles and charging or fueling infrastructure for zero emission passenger vehicles, and not to exceed \$20,000 for official reception and representation expenses, not more than \$15,230,924,000 may be expended, as authorized by section 201(g)(1) of the Social Security Act, from any one or all of the trust funds referred to in such section: Provided, That not less than \$3,150,000 shall be for the Social Security Advisory Board: Provided further, That \$50,000,000 shall remain available until expended for benefits modernization: Provided further, That \$2,000,000 shall remain available through September 30, 2026, for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure: Provided further, That, of the amounts made available in the previous proviso, \$700,000 shall be transferred to the "Social Security Administration—Office of the Inspector General", for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure: Provided further, That such transfer authority is in addition to any other transfer authority provided by law: Provided further, That unobligated balances of funds provided under this paragraph at the end of fiscal year 2025 not needed for fiscal year 2025 shall remain available until expended to invest in the Social Security Administration information technology and telecommunications hardware and software infrastructure, including related equipment and non-payroll administrative expenses associated solely with this information technology and telecommunications infrastructure, except unobligated balances of funds described in the first proviso of this paragraph at the end of fiscal year 2025 not needed for fiscal year 2025 shall remain available until expended to invest in the Social Security Advisory Board information technology: Provided further, That the Commissioner of Social Security shall notify the

Limitation on Administrative Expenses

Committees on Appropriations of the House of Representatives and the Senate prior to making unobligated balances available under the authority in the previous proviso: Provided further, That reimbursement to the trust funds under this heading for expenditures for official time for employees of the Social Security Administration pursuant to 5 U.S.C. 7131, and for facilities or support services for labor organizations pursuant to policies, regulations, or procedures referred to in section 7135(b) of such title shall be made by the Secretary of the Treasury, with interest, from amounts in the general fund not otherwise appropriated, as soon as possible after such expenditures are made.

From funds provided under the first paragraph, \$1,903,000,000, to remain available through March 31, 2026, is for the costs associated with continuing disability reviews under titles II and XVI of the Social Security Act, including work-related continuing disability reviews to determine whether earnings derived from services demonstrate an individual's ability to engage in substantial gainful activity, for the cost associated with conducting redeterminations of eligibility under title XVI of the Social Security Act, for the cost of co-operative disability investigation units, and for the cost associated with the prosecution of fraud in the programs and operations of the Social Security Administration by Special Assistant United States Attorneys: Provided, That, of such amount, \$273,000,000 is provided to meet the terms of section 251(b)(2)(B)(ii)(III) of the Balanced Budget and Emergency Deficit Control Act of 1985, as amended, and \$1,630,000,000 is additional new budget authority specified for purposes of section 251(b)(2)(B) of such Act: Provided further, That, of the additional new budget authority described in the preceding proviso, \$19,600,000 may be transferred to the "Social Security Administration—Office of Inspector General", for the cost of jointly operated co-operative disability investigation units: Provided further, That such transfer authority is in addition to any

Limitation on Administrative Expenses

other transfer authority provided by law: Provided further, That the Commissioner shall provide to the Congress (at the conclusion of the fiscal year) a report on the obligation and expenditure of these funds, similar to the reports that were required by section 103(d)(2) of Public Law 104–121 for fiscal years 1996 through 2002: Provided further, That none of the funds described in this paragraph shall be available for transfer or reprogramming except as specified in this paragraph.

In addition, \$170,000,000, to be derived from administration fees in excess of \$5.00 per supplementary payment collected pursuant to section 1616(d) of the Social Security Act or section 212(b)(3) of Public Law 93–66, which shall remain available until expended: Provided, That to the extent that the amounts collected pursuant to such sections in fiscal year 2025 exceed \$170,000,000, the amounts shall be available in fiscal year 2026 only to the extent provided in advance in appropriations Acts.

In addition, up to \$1,000,000 to be derived from fees collected pursuant to section 303(c) of the Social Security Protection Act, which shall remain available until expended.

Note. —A full-year 2024 appropriation for this account was not enacted at the time the Budget was prepared; therefore, the Budget assumes this account is operating under the Continuing Appropriations Act, 2024 and Other Extensions Act (Division A of Public Law 118–15, as amended). The amounts included for 2024 reflect the annualized level provided by the continuing resolution.

LANGUAGE ANALYSIS

The Limitation on Administrative Expenses¹ (LAE) appropriation language provides us with \$15.402 billion to administer the Old Age and Survivors Insurance (OASI), Disability Insurance (DI), and Supplemental Security Income (SSI) programs, and to support the Centers for Medicare and Medicaid Services in administering their programs. The LAE account receives funding from the OASI, DI, and Medicare trust funds for their shares of administrative expenses, from the General Fund of the Treasury for the SSI program’s share of administrative expenses, and through applicable user fees. The language provides the limitation on the amounts that may be expended from these separate sources for our administrative expenses.

We have a responsibility to enhance our technology to better meet the needs of our customers, and our request allows us to carryover unobligated balances for non-payroll automation and telecommunications investment costs in future fiscal years. Our request also includes \$50,000,000 to remain available until expended to modernize our benefits system. This funding will allow us to accelerate our business process and technology modernization to enable more seamless, intuitive, and secure service for both claimants and current beneficiaries.

We have a responsibility to ensure eligible individuals receive the benefits to which they are entitled, and to safeguard the integrity of benefit programs to better serve recipients. The appropriations language requests \$1,903,000,000 in dedicated program integrity funding, including \$273,000,000 in base funding and a \$1,630,000,000 cap adjustment, consistent with the Fiscal Responsibility Act (FRA) of 2023 (P.L. 118-5). The Budget also includes a \$19,600,000 transfer from the allocation adjustment to the Office of Inspector General (OIG) for the costs associated with jointly operated cooperative disability investigations (CDI) units.

In addition to the appropriated amounts, we are requesting to spend up to \$170,000,000 in SSI State Supplement user fees and up to \$1,000,000 in non-attorney representative fees.

Table 3.2—Appropriation Language Analysis

Language Provision	Explanation
<i>“For necessary expenses, including the hire and purchase of passenger motor vehicles and charging or fueling infrastructure for zero emission passenger vehicles...”</i>	In support of the President’s goal of transitioning to a fully Zero Emission Vehicle (ZEV) Federal fleet, the request includes \$2,000,000 for zero emission vehicle (ZEV - battery electric, plug-in
<i>“Provided further, That \$2,000,000 shall</i>	

¹ A full-year 2024 appropriation for this account was not enacted at the time the Budget was prepared; therefore, the Budget assumes this account is operating under the Continuing Appropriations Act, 2024 and Other Extensions Act (Division A of Public Law 118–15, as amended). The amounts included for 2024 reflect the annualized level provided by the continuing resolution, with the exception of the cap adjustment amount. 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. The SSA Congressional Justification assumes a \$19.1 million transfer from the LAE account to the OIG for costs associated with jointly operated CDI unit costs in FY 2024, the same level as the 2024 Budget. See the Program Integrity exhibit in the LAE section for more information.

Limitation on Administrative Expenses

Language Provision	Explanation
<p><i>remain available through September 30, 2026, for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure...</i></p> <p><i>"Provided further, That, of the amounts made available in the previous proviso, \$700,000 shall be transferred to the " Social Security Administration—Office of the Inspector General", for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure: Provided further, That such transfer authority is in addition to any other transfer authority provided by law:"</i></p>	<p>electric hybrid, and hydrogen fuel cell vehicles) acquisitions and deploying necessary vehicle charging and refueling infrastructure. These funds are available through September 30, 2026, of which \$700,000 is for the OIG. These acquisitions are a significant step towards eliminating tailpipe emissions of greenhouse gases from our fleet and aligning fleet operations with the goal of achieving a fully ZEV federal fleet. ZEV acquisitions may include vehicles for both agency-owned and GSA-leased segments of our vehicle fleet, including incremental costs of leased vehicles and lease payments to GSA for conversion of agency-owned vehicles to GSA’s leased fleet where appropriate.</p>
<p><i>“Provided, That not less than \$3,150,000 shall be for the Social Security Advisory Board...”</i></p> <p><i>“...unobligated balances of funds described in the first proviso of this paragraph at the end of fiscal year 2025 not needed for fiscal year 2025 shall remain available until expended to invest in the Social Security Advisory Board information technology...”</i></p>	<p>The language allows the Social Security Advisory Board to carryover unobligated balances for non-payroll automation and telecommunications investment costs in future fiscal years.</p>
<p><i>“Provided further, That \$50,000,000 shall remain available until expended for benefits modernization...”</i></p>	<p>The request includes \$50,000,000 for dedicated, no-year funding to modernize our benefits system.</p>
<p><i>“Provided further, That unobligated balances of funds provided under this paragraph at the end of fiscal year 2025 not needed for fiscal year 2025 shall remain available until expended to invest in the Social Security Administration information technology and telecommunications hardware and software infrastructure, including related equipment and non-payroll administrative expenses associated solely with this information technology and telecommunications infrastructure...”</i></p>	<p>The language allows us to carryover unobligated balances for non-payroll automation and telecommunications investment costs in future fiscal years.</p>

Limitation on Administrative Expenses

Language Provision	Explanation
<i>“Provided further, That the Commissioner of Social Security shall notify the Committees on Appropriations of the House of Representatives and the Senate prior to making unobligated balances available under the authority in the previous proviso... ”</i>	
<i>“Provided further, That reimbursement to the trust funds under this heading for expenditures for official time for employees of the Social Security Administration pursuant to 5 U.S.C. 7131, and for facilities or support services for labor organizations pursuant to policies, regulations, or procedures referred to in section 7135(b) of such title shall be made by the Secretary of the Treasury, with interest, from amounts in the general fund not otherwise appropriated, as soon as possible after such expenditures are made.”</i>	The language provides that the general fund of the United States Treasury will reimburse the Social Security trust funds, with interest, for the portion of official expenses attributable to the trust funds.
<i>“From funds provided under the first paragraph, \$1,903,000,000, to remain available through March 31, 2026, is for the costs associated with continuing disability reviews under titles II and XVI of the Social Security Act, including work-related continuing disability reviews to determine whether earnings derived from services demonstrate an individual's ability to engage in substantial gainful activity, for the cost associated with conducting redeterminations of eligibility under title XVI of the Social Security Act, for the cost of co-operative disability investigation units, and for the cost associated with the prosecution of fraud in the programs and operations of the Social Security Administration by Special Assistant United States Attorneys: Provided, That, of such amount, \$273,000,000 is provided to meet the terms of section 251(b)(2)(B)(ii)(III) of the Balanced Budget and Emergency Deficit Control Act of 1985, as amended, and \$1,630,000,000 is additional new budget authority specified for purposes of section 251(b)(2)(B) of such Act: Provided further,</i>	The language appropriates \$1,903,000,000 for dedicated program integrity funding, to remain available through March 31, 2026, for full medical CDRs, redeterminations, work-related CDRs, CDI units, and fraud prosecutions by Special Assistant United States Attorneys. The language transfers \$19,600,000 from the program integrity allocation adjustment to the OIG to fund CDI unit activities. Additionally, this language prohibits the transfer or reprogramming of program integrity funding, except for the \$19,600,000 transfer to OIG. For additional information, please refer to the Program Integrity section.

Limitation on Administrative Expenses

Language Provision	Explanation
<p><i>That, of the additional new budget authority described in the preceding proviso, \$19,600,000 may be transferred to the " Social Security Administration—Office of Inspector General", for the cost of jointly operated co-operative disability investigation units: Provided further, That such transfer authority is in addition to any other transfer authority provided by law: Provided further, That the Commissioner shall provide to the Congress (at the conclusion of the fiscal year) a report on the obligation and expenditure of these funds, similar to the reports that were required by section 103(d)(2) of Public Law 104–121 for fiscal years 1996 through 2002: Provided further, That none of the funds described in this paragraph shall be available for transfer or reprogramming except as specified in this paragraph."</i></p>	
<p><i>"In addition, \$170,000,000, to be derived from administration fees in excess of \$5.00 per supplementary payment collected pursuant to section 1616(d) of the Social Security Act or section 212(b)(3) of Public Law 93–66, which shall remain available until expended: Provided, That to the extent that the amounts collected pursuant to such sections in fiscal year 2025 exceed \$170,000,000, the amounts shall be available in fiscal year 2026 only to the extent provided in advance in appropriations Acts."</i></p>	<p>The language makes available up to \$170,000,000 collected from States for administration of their supplementary payments to the SSI program. This assumes the fee will increase from \$14.78 per check in FY 2024 to \$15.22 in FY 2025 according to increases established by statute. We receive the amount collected above \$5.00 from each fee.</p>
<p><i>"In addition, up to \$1,000,000 to be derived from fees collected pursuant to section 303(c) of the Social Security Protection Act, which shall remain available until expended."</i></p>	<p>The language provides for the use of up to \$1,000,000 derived from fees charged to non-attorneys who apply for certification to represent claimants.</p>

SIGNIFICANT ITEMS IN APPROPRIATIONS COMMITTEE REPORTS

The table below includes the significant items in the FY 2024 Explanatory Materials for H.R. 5894 and Senate Report, S. Rept. 118-84, for S. 2624.

Table 3.3—Significant Items in Appropriations Committee Report

FY 2024 Explanatory Materials for H.R. 5894

Committee Report Item	Action
<u>Telework</u>	<u>Actions Taken or To Be Taken</u>
The Committee is concerned that 99 percent of SSA’s 26,000 employees in the field offices are under maximum telework status, while average processing time for claims, hearings, and phone wait times, have not improved. In addition, SSA has received over \$2 billion in additional administrative funding from Congress over the last two years to address these issues. The Committee directs SSA to submit to the Committees within 90 days of enactment of this Act a report on the telework status of its entire workforce, detailing the performance metrics used to assess the performance of teleworking employees and their adherence to those metrics, such report shall be made available online on the agency’s website.	We will provide the report by the requested due date.
<u>Electronic Consent Based Social Security Number Verification (eCBSV) Service</u>	<u>Actions Taken or To Be Taken</u>
The Committee encourages SSA to restructure eCBSV user fees in a manner that does not discourage permitted entities from utilizing the system and in a manner that does not seek to recover costs before such time as required by law.	We acknowledge the Committee’s recommendation.
<u>Report on LAE Expenditures</u>	<u>Actions Taken or To Be Taken</u>
The Committee continues to request that the data referenced under this heading in House Report 114–699 be included in future congressional justifications. In addition, the Committee requests the fiscal year 2025	Please refer to Table 3.18, Table 3.19, and Table 3.20 for the historical table of costs and FY 2025 requests for personnel and benefits by major SSA component.

Limitation on Administrative Expenses

Committee Report Item	Action
congressional justification include a historical table of costs and fiscal year 2025 requests for personnel and benefits, by major SSA component to include Operations (field offices, teleservice centers, processing centers, and regional offices); Office of Hearings Operations; Systems; Office of Analytics, Review, and Oversight; and Headquarters.	For Information Technology costs broken out by hardware/software technology and upgrade/maintenance costs, please see Appendix A of the Information Technology exhibit included in the LAE section of this Congressional Justification (CJ). For Physical infrastructure costs by region and office function, please see Tables 3.32 through 3.37. For Overall costs for personnel, time and dollars for OASI, DI, SSI, and other SSA missions, please see Table 3.13. For Program Integrity work broken out by OASI, DI and SSI as well as types of spending, please see Table 3.22b. For Disability Determination Services State costs and Federal staff costs, please see Table 3.17.
<u>Information Technology (IT)</u>	<u>Actions Taken or To Be Taken</u>
The Committee is concerned that SSA’s antiquated IT service management system is adversely impacting agency staff’s ability to deliver the value, service, and efficiency that the public expects and deserves. The Committee recognizes that SSA began modernizing its IT Service Management tools in fiscal year 2021 and expects SSA to continue working on IT solutions to improve customer service, ensure high availability and service continuity, optimize operational efficiency, and maximize enterprise productivity. The Committee directs SSA to publish online within 180 days of enactment of this Act a detailed report on how the agency has allocated IT funding over the past 10 years and the agency’s plans to modernize its various IT systems.	<p>Please refer to our Information Technology exhibit in the LAE section of this CJ for information on our plans to modernize our various IT systems.</p> <p>We will provide the information on how we have allocated IT funding over the past 10 years by the requested due date.</p>
<u>Administrative Law Judge Allowance Rates</u>	<u>Actions Taken or To Be Taken</u>
The Committee believes it is vital that Administrative Law Judges (ALJs) maintain public confidence in the fairness of the process through which Social Security benefit applications are determined. The Committee expects that the agency’s reviews of the ALJ adherence to agency policies and procedures	We will provide the report by the requested due date.

Limitation on Administrative Expenses

Committee Report Item	Action
will uphold these essential conditions. The Committee directs SSA to submit a report to the Committees within 90 days of enactment of this Act detailing SSA's plans to monitor ALJs with low allowance rates.	
<u>Disability Backlogs</u>	<u>Actions Taken or To Be Taken</u>
The Committee directs SSA to continue to submit to the Committee quarterly reports on disability hearings backlogs until SSA has eliminated the hearings backlog and achieved its monthly average processing time goal.	We will provide monthly reports and the quarterly briefings as requested.
<u>Outreach</u>	<u>Actions Taken or To Be Taken</u>
The Committee directs SSA to provide to the committees of jurisdiction within 120 days of enactment of this Act a report on the outlays (fiscal years 2020–2022 actual, 2023/24 projected) associated with SSA's outreach efforts to increase SSA's initial disability applications by 15 percent (25 percent in underserved communities), including how SSA is evaluating the efficacy of the outreach efforts, the outreach cost per additional application, the total administrative cost of the additional applications resulting from the outreach efforts, and the approval rate of applications filed as a result of the outreach efforts. Additionally, the Committee directs the agency to make such report publicly available on its website.	<p>Please refer to our Advancing Equity, including Diversity, Equity, Inclusion, and Accessibility in the Workforce, and Outreach to People Facing Barriers exhibit in the LAE section of this CJ for information on outreach efforts.</p> <p>We will provide the report by the requested due date.</p>
<u>Occupational Information System (OIS) Project</u>	<u>Actions Taken or To Be Taken</u>
The Committee directs SSA to provide to the committees of jurisdiction within 180 days of enactment of this Act a report on the outlays (fiscal years 2012–2023) associated with SSA's Occupational Information System (OIS) Project, including the agency's justification for replacing the Dictionary of Occupational Titles with the OIS, the status of the development of the Vocational Information Tool, and a detailed timeline of the agency's plans to operationalize OIS. Additionally, the	<p>Please refer to our annual report to Congress on OIS as well as the Research and Demonstration exhibit in the SSI Program section of this CJ for most of this information.</p> <p>Full completion of these activities, including operationalizing OIS, is a multi-year effort, and we will develop specific timelines as we move forward.</p>

Limitation on Administrative Expenses

Committee Report Item	Action
Committee directs SSA to make such information publicly available on its website.	<p>We do not anticipate fully implementing the OIS until we have thoroughly reviewed the new occupational data; we have identified the necessary policy, process, and systems updates to implement the OIS; and we have adequately addressed intergovernmental and public feedback on our approach through the regulatory process.</p> <p>Again, we want to emphasize that SSA’s current decision-making process remains sound. Even though the new OIS data presents an opportunity to update the disability adjudication process, our existing regulatory and policy framework continues to ensure evidence-based disability decision-making.</p>
<u>Cybersecurity Risks from Commercial Information Technology</u>	<u>Actions Taken or To Be Taken</u>
The Committee notes the Department of Defense in consultation with other Federal agencies will conduct an assessment of risks posed using commercially available information technology, particularly relating to computer and printers from countries of concern. The Committee looks forward to receiving this analysis and supports efforts to ensure any recommendations are disseminated to all relevant Federal agencies for implementation.	We acknowledge the Committee’s statement.
<u>Hiring and Retention</u>	<u>Actions Taken or To Be Taken</u>
The Committee directs SSA submit to the Committee within 90 days of enactment of this Act a report on hiring, training, and retention over the past decade by job description that includes the cost per hire, the breakeven point of how long a new hire has to remain in their role to recoup the SSA’s investment in recruitment and training, and the actual retention rates of new hires by fiscal year.	We will provide the report by the requested due date.

Limitation on Administrative Expenses

Committee Report Item	Action
<u>Supplemental Security Income (SSI) Income Support and Maintenance (ISM)</u>	<u>Actions Taken or To Be Taken</u>
The Committee directs SSA to complete an assessment and submit to the committees of jurisdiction a report within 120 days of enactment of this Act on the effects that omitting food from the ISM calculation would have on supplemental State program financing and administration. Additionally, the Committee directs the agency to make such information publicly available on its website.	We provided some cost estimates in our NPRM ; we acknowledge the Committee's request for additional data although do not have the information available.
<u>Limitation on Administrative Expense</u>	<u>Actions Taken or To Be Taken</u>
Within the total for LAE, the Committee provides not less than \$4,000,000,000 for field offices and not less than \$1,500,000,000 for Information Technology (IT). These amounts represent the anticipated spending levels for field offices and IT respectively in fiscal year 2023. The Committee strongly supports the needs of seniors and the front-line service provided by local field offices, and funding for field offices is prioritized over the administrative Federal offices. In addition, SSA should prioritize improvements in information technology to ensure the safety and reliability of its data and systems.	We acknowledge the Committee's statement.
<u>Work Incentives Planning and Assistance (WIPA) and Protection and Advocacy for Beneficiaries of Social Security (PABSS)</u>	<u>Actions Taken or To Be Taken</u>
The recommendation includes \$23,000,000 for WIPA grants and \$10,000,000 for PABSS, the same as the fiscal year 2023 enacted level.	We acknowledge the Committee's statement.

Senate Report, S. Rept. 118-84, for S. 2624

Committee Report Item	Action
<u>Cooperative Disability Investigations (CDI)</u>	<u>Actions Taken or To Be Taken</u>
The Committee directs SSA to provide an update in its fiscal year 2025 CJ on CDI units, including updates on the program's projected	Please refer to the Detecting and Preventing Social Security Disability Fraud Through

Limitation on Administrative Expenses

Committee Report Item	Action
savings to SSA's disability programs, total recovery amounts, and projected savings to other Federal and State programs. Such updates shall also include suggestions regarding other ways Federal and State agencies may partner on anti-fraud initiatives with respect to Social Security programs.	Investigations section of the CJ for the Office of the Inspector General.
<u>IT Modernization Procurement Policies</u>	<u>Actions Taken or To Be Taken</u>
According to SSA's OIG report titled Agile Software Development at the Social Security Administration, SSA implemented some appropriate control and practices to manage its Agile software development projects, but is not using Agile consistently across all of its software development projects. The OIG's analysis identified instances in which SSA did not follow key Agile development best practices related to delivery of planned work; appropriate development of system requirements, capabilities and features; size and composition of Agile development teams; definition of team policies and other basic practices; lessons learned; human-centered design practices; testing and peer reviews. The Committee encourages SSA to implement OIG's recommendations and requests a briefing within 90 days of enactment on its progress in doing so.	We will provide a briefing as requested.
<u>Disability Backlogs</u>	<u>Actions Taken or To Be Taken</u>
The committee recognizes the pandemic created significant challenges for SSA, which has contributed to a significant increase in processing times for initial disability claims. The Committee is deeply concerned that staffing challenges will make it difficult for SSA to address growing backlogs but expects SSA will, to the greatest extent possible, prioritize funding to reduce the initial disability claims backlog. The Committee directs SSA to continue to provide monthly reports to the Committee on key agency performance metrics and to provide quarterly briefings to the Committees on its progress	We will provide monthly reports and the quarterly briefings as requested.

Limitation on Administrative Expenses

Committee Report Item	Action
toward reducing the initial disability claims and hearings backlogs, as well as addressing other service delivery challenges.	
<u>Expanding Outreach to People with Disabilities and Experiencing Homelessness</u>	<u>Actions Taken or To Be Taken</u>
The Committee strongly encourages SSA to expand outreach to potential beneficiaries, prioritizing underserved communities and individuals most likely to need support, including those experiencing homelessness. The Committee encourages SSA to leverage its existing Federal and State relationships to identify individuals who may be eligible for SSI and SSDI programs. The Committee directs SSA to include information in its fiscal year 2025 CJ on such efforts.	Please refer to our Advancing Equity, including Diversity, Equity, Inclusion, and Accessibility in the Workforce, and Outreach to People Facing Barriers exhibit in the LAE section of this CJ for information on outreach as well as our Equity Action Plan and Equity Action Plan 2023 Update for more information on support for those experiencing homelessness.
<u>Express Appointments</u>	<u>Actions Taken or To Be Taken</u>
The Committee commends SSA for the creation of innovative service delivery improvements implemented during the pandemic. Given SSA's stated plans to expand the number of visitors that are served at field offices since the pandemic, the Committee directs SSA to provide an update in the 2025 CJ detailing the agency's plans for expansion of Express Services, including the expected timeline of such expansion, mechanisms for providing such services, and planned national availability and capacity. Such an update shall also include any substantial progress made or plans to implement other significant service delivery challenges in field offices.	Please refer to our Information Technology section of this CJ for this information.
<u>Supplemental Security Income Application Simplification</u>	<u>Actions Taken or To Be Taken</u>
The complexity of the SSI program and application process can make it difficult for individuals to apply for benefits. This is an even bigger challenge given the individuals relying on SSI, including those experiencing homelessness, diagnosed with a terminal illness, and disabled veterans. It is also one of SSA's most resource intensive and time-	We will provide the report by the requested due date.

Limitation on Administrative Expenses

Committee Report Item	Action
<p>consuming workloads that contributes to SSA’s overall service delivery challenges and funding needs. The Committee strongly encourages SSA to prioritize simplifying the SSI application and making it available online. As many components of the SSI application are required by statute, simplification may require legislative changes. Therefore, within 120 days of enactment, SSA shall submit a report to the Committees on Appropriations and Ways and Means of the House of Representatives and the Committees on Appropriations and Finance of the Senate regarding the agency’s efforts to simplify the SSI application and program, including a list of proposed legislative changes aimed at simplifying the SSI application for claimants.</p>	
<u>Reducing Submission of Physical Documentation</u>	<u>Actions Taken or To Be Taken</u>
<p>Pursuant to Executive Order 14058, Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government, SSA is directed to identify “potential opportunities for policy reforms that can support modernized customer experiences while ensuring original or physical documentation requirements remain where there is a statutory or strong policy rationale.” SSA was also directed to “develop a mobile mobile-accessible, online process so that any individual applying for or receiving services from the Social Security Administration can upload forms, documentation, evidence, or correspondence associated with their transaction without the need for service-specific tools or traveling to a field office.” The Committee directs SSA to submit a report to the House and Senate Committee on Appropriations, the House Committee on Ways and Means, and the Senate Committee on Finance within 180 days of enactment on the list of proposed policy reforms to improve customer experience, as well as a project timeline on implementing the online portal</p>	<p>Our 2023 Customer Experience (CX) Action Plan provides a summary of our FY 2023 progress and planned actions for FY 2024. More information on CX progress and accomplishments can be found on Performance.gov.</p> <p>We will provide the report by the requested due date.</p>

Limitation on Administrative Expenses

Committee Report Item	Action
allowing individuals submitting documents electronically.	
<u>Staffing Plan</u>	<u>Actions Taken or To Be Taken</u>
<p>The Committee notes the importance of ensuring SSA has the necessary workforce to operate efficiently and provide high-quality service to program beneficiaries. The Committee requests SSA, within 90 days of enactment of this act and quarterly thereafter, provide a staffing report detailing FTEs and new hires by component. These reports shall include the total number of new hires, departed employees, net change in FTEs, and funds obligated and expended on new hires, broken down by programmatic area. These reports should also include a written hiring plan detailing SSA’s strategy to enhance its recruitment and retention, its implementation of the strategy, and recommended administrative and legislative actions to enhance the agency’s recruitment and retention.</p>	<p>We will provide the report by the requested due date.</p>
<u>Work Incentives Planning and Assistance (WIPA) and Protection and Advocacy for Beneficiaries of Social Security (PABSS)</u>	<u>Actions Taken or To Be Taken</u>
<p>The Committee recommendation includes \$23,000,000 for WIPA and \$10,000,000 for PABSS, the same as the comparable fiscal year 2023 levels, respectively. These programs provide valuable services to help Social Security disability beneficiaries return to work. The Committee notes that delayed suitability determinations have in some cases significantly affected the ability of PABSS grantees to carry out their mission to protect the rights and best interests of individuals with disabilities.</p>	<p>We acknowledge the Committee’s statement.</p>

Limitation on Administrative Expenses

IMPROPER PAYMENTS

We take seriously our responsibilities to ensure eligible individuals receive the benefits to which they are entitled, and to safeguard the integrity of our benefit programs. Our internal quality reviews, which a third-party auditor validates, indicate that our fiscal year (FY) 2022 Old-Age, Survivors, and Disability Insurance (OASDI) benefit payments were 99.49 percent free of overpayment and 99.86 percent free of underpayment.¹ For the same year, 91.98 percent of all Supplemental Security Income (SSI) payments were free of overpayment and 98.82 percent were free of underpayment.² FY 2023 data are not yet available. 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, we issued about \$1.3 trillion in benefit payments, and our projected combined overpayments and underpayments totaled \$8.3 billion for OASDI and \$5.3 billion for SSI.

We are improving service to our beneficiaries and recipients. Our commitment is to improve the integrity of our programs by reducing overpayments and underpayments through efforts such as streamlining our policies and procedures, automating our business processes, and leveraging data through exchanges with Federal, State, and private partners. We perform quality reviews, conduct employee training, and promote the use of online wage reporting applications. Online wage reporting applications make it easier for people to report their wages which may affect their payment amount. We assembled an executive-led Overpayment Review Team to conduct a holistic assessment of how our administrative procedures influence our overpayment processes for customers and are evaluating next steps that complement our ongoing stewardship work in 2024 and 2025.

Overpayments can occur for multiple reasons, and each person's situation must be handled on a case-by-case basis. SSA is required by law to adjust benefits or recover debts when people receive payments to which they were not entitled.

It is critical that individuals understand overpayment notices and how to request a waiver. In FY 2023, we streamlined the Request for Waiver of Overpayment Recovery form ([Form SSA-632](#)) to reduce the burden on the requestor. We let people know 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.

Wages are a major cause of payment errors. To help facilitate efficient self-reporting of wages, we built several reporting channels. Individuals can report wage information via the myWageReport online application, automated SSI Telephone Wage Reporting, or the SSAMobile Wage Reporting application. Individuals can sign up to receive a text message or

¹ We derive accuracy rates for OASDI based on a monthly sample of beneficiaries who reside in the U.S and outside of the 50 States or U.S. territories.

² We derive accuracy rates using data collected from the review of a national sample of SSI cases.

Limitation on Administrative Expenses

email reminders to report their prior month's wages. In FY 2023, we posted a video on the use of these reporting mechanisms on YouTube, Facebook, and Social Security TV in field office reception areas. We implemented multi-factor authentication for users of the SSAMobile Wage Reporting application.

The Payroll Information Exchange (PIE) will improve customer service and combat improper payments. By receiving payroll information directly from payroll data providers and using that data to timely adjust benefits, PIE will help prevent overpayments for beneficiaries and recipients who provide authorization and whose employer reports wages through PIE. PIE will help our customers by reducing the responsibility to report wage information when we are receiving it through the exchange. It will also help our technicians by eliminating work and time spent obtaining and verifying wage data.

In FY 2023, we conducted pre-implementation development to create wage-reporting notices specific to PIE, updated existing authorization receipt language, and created special alerts for cases that require manual review by a technician. On February 15, 2024, we published a [Notice of Proposed Rulemaking](#) to implement the exchange and automate PIE data. We will perform ongoing assessments while working toward full implementation.

In-Kind Support and Maintenance (ISM) changes contribute to both overpayments and underpayments in the SSI program. ISM is food, shelter, or both provided by someone living inside or outside an SSI applicant's or recipient's household; it is never cash. Under the [law](#), ISM is counted as income when we determine eligibility for SSI, unless an exclusion applies. In FY 2024, we are pursuing the following regulatory changes to simplify the ISM policies:

- **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*) 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 inside 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.

One of our agency priority goals is to improve equity in the SSI program by increasing underpayment processing of our oldest and highest priority cases, including those disproportionately impacted by poverty. By September 30, 2025, we plan to complete 98

Limitation on Administrative Expenses

percent of SSI underpayments that have been identified as priority cases or pending for a year or more at the beginning of FY 2024.

We implemented UiPath™ Robotics Software in FY 2021 to create our own automated programs or bots. With minimal human interaction, these bots perform routine analysis and actions to reduce manual data entry and human error. In FY 2023, approximately 2,635 users utilized bots an average of 26,500 times per week. We are exploring expansion of bot use, prioritizing those that will have the biggest impact on reducing improper payments.

We also have been making debt recovery improvements for our customers. Our online remittance processing gives individuals multiple options for repaying debts. In FY 2023, we processed 464,000 remittances and collected nearly \$94 million through our Pay.gov remittance channel, slightly more than was collected in FY 2022. In FY 2023, our lockbox service processed approximately 216,000 remittances, worth over \$54 million, and our Online Bill Pay option processed over 41,000 remittances—over twice as many as in FY 2022—and collected over \$4 million. Combined with our previously implemented Social Security Electronic Remittance System, these remittance channels now process 65 percent of our remittances—an increase of 5 percent over FY 2022.

Please refer to the Overview, the Program Integrity exhibit, our IT exhibit, our [*Annual Performance Report*](#), our [*Agency Financial Report*](#), and paymentaccuracy.gov for more information on our efforts to reduce improper payments.

PILOT PROGRAMS

Pilot programs provide an opportunity to evaluate the effects of potential process changes and measure overall effectiveness.

COMPLETED PILOTS

Electronic Enumeration Holding File (EEHF)

SSA policy requires that field offices and Social Security Card Centers (SSCC) establish a holding file for Social Security Number (SSN) applications when documents are pending verification with the issuing agency (e.g., Department of Homeland Security (DHS) or State Bureaus of Vital Statistics). Traditionally, these holding files consist of technician-certified paper copies of the applicant's evidence. The EEHF provides an electronic option for holding documents that require retention after verification.

In January 2023, we evaluated the EEHF initiative in two field offices for six weeks. Based on this testing, we found:

- Management reported the business process was clear and easy to follow;
- The electronic files are more organized and take less time to retrieve; and
- The electronic files help to solve storage space issues.

Overall, using EEHF increased efficiency and saved managers and technicians time. In April 2023, we released the EEHF option nationwide.

Desktop Scanner Initiative

Prompted by the large number of enumeration applications received from non-U.S. citizens in certain offices in the Atlanta and Dallas regions, we explored ways to improve efficiency in the front-end interview process. In conjunction with the EEHF, we piloted using desktop scanners at front-end interviewing stations in field offices to reduce interview time.

In January 2023, we piloted this project for 6 weeks with 10 scanners in one office. The office used these scanners to digitize and save documents for enumeration applications, post-entitlement work, and claims applications.

During the pilot, our technicians reported time savings for enumeration interviews and claim or post-entitlement actions requiring claimants to provide evidence. Field office management noted that the desktop scanners are faster to operate and provide superior quality images when compared to multi-function devices, which are prevalent in most offices.

With the success of the pilot, in March 2023, we released additional scanners to high-volume offices in the Atlanta and Dallas regions and select offices in other regions. We now have 825 scanners in use across all 10 regions.

Limitation on Administrative Expenses

Scanning Documents with iPhone for Online Social Security Number Application Process (oSSNAP) Applications

In fiscal year (FY) 2023, we piloted an evidentiary document scanning initiative in four offices to reduce wait times for individuals requesting enumeration services through the web-based oSSNAP application. The oSSNAP application allows individuals who meet certain criteria to begin an application for an original or a replacement SSN card online. After submitting the online portion, applicants provide required evidence to the local Social Security field office or SSCC.

During the pilot, we issued 21 iPhones to non-bargaining unit members of management in select offices. Management used the iPhones to capture an image of the evidentiary documents for replacement card applications initiated in oSSNAP. Management then certified the documents and uploaded them for technician review and processing through the Social Security Number Application Process.

We found that using iPhones to scan evidentiary documents for oSSNAP applications did not result in a substantial reduction in wait times. During the test, usage was low and there was a drastic decrease in usage in most offices after the evaluation period ended. The process was cumbersome and required a significant time investment from management. In addition, we incurred a cost to maintain service for the phones and the return on investment was relatively low when compared to usage. We decided to discontinue the pilot and did not implement the iPhone initiative.

ACTIVE PILOTS

Ticket to Work (TTW) Notice Optimization

The TTW and Work Incentives Improvement Act of 1999 established the TTW program to increase options for Disability Insurance (DI) beneficiaries and Supplemental Security Income (SSI) recipients who wish to obtain employment services. We provide DI beneficiaries and SSI recipients with a “Good News” notice about how to obtain employment services from a vocational rehabilitation (VR) agency or an Employment Network of their choice. Goals of the TTW program include increasing the number of beneficiaries and recipients that work at the substantial gainful activity level and no longer rely on DI and SSI payments, expanding the availability of services for beneficiaries, reducing dependency on DI benefits and SSI payments, and obtaining benefit reductions that are greater than the cost we pay for services.

Participation rates are a key factor in the program’s success. Though the program has served close to 1.2 million beneficiaries and recipients since 2000, participation in the program has been relatively low in relation to the total number of beneficiaries and recipients we serve. In FY 2020, as a result of low participation in the TTW program, we created the TTW Notice Optimization pilot through an inter-agency agreement with the General Services Administration (GSA) to test if changing the notices we send to DI beneficiaries and SSI recipients, and sending them at different intervals, would enhance participation in the TTW program and ensure DI beneficiaries and SSI recipients better understand the program and its process. The new notices provided simpler, plain-language information about the TTW program, including the process and

Limitation on Administrative Expenses

potential benefits. In FY 2020, we extended the time for mailing the new notices from 9 to 18 months due to the high unemployment rate and the economic uncertainty caused by the COVID-19 pandemic. We measured outcomes at 9 months post-mailing for each individual that received a revised notice as well as each member of the control group.

Evaluation Plan/Timeline

FY 2020:

- We worked with GSA to finalize the notice prototypes to send upon award of DI or SSI and after 1 and 2 years of receiving benefits. We also worked with GSA to develop the evaluation design for the pilot. We wrote the Good News notices – that individuals receive when awarded disability benefits – to comply with plain language guidelines and improve participation in the TTW program. We also registered the study with the American Economic Association randomized study trial registry.
- We modified the system needed to randomize notice mailings.
- We began mailing notices in September 2020.

FY 2021:

- We continued testing prototype notices and conducting data analyses.

FY 2022:

- We worked with GSA to conduct the final analyses of the new mailings.

FY 2023:

- GSA provided us with a draft report of their preliminary results, which we reviewed.

FY 2024

- GSA will provide a final report of their results in the third quarter of FY 2024, which we will review. We will publish the information on our [Disability Research](#) webpage.

Measure of Success/Metrics

We found that the revised mailings did not increase Ticket assignments but did increase calls to the Ticket call center from individuals requesting additional information. This is beneficial because it furthers awareness of the Ticket Program to eligible Ticketholders, which may lead to employment support services provided, and employment. We will continue using the revised language and mailing schedule and view these findings as an opportunity for future research.

Video Service Delivery (VSD) Expansion, DHS Pilot Expansion

In partnership with DHS's U.S. Citizenship and Immigration Services (USCIS), we plan to conduct a pilot to use our existing VSD Polycom units during interviews to process replacement SSN card applications for non-U.S. citizens regardless of whether they require a change to their record (e.g., name change, correction). We will also utilize these units to process E-Verify SSA

Limitation on Administrative Expenses

Tentative Non-confirmation cases for both U.S. citizens and non-U.S. citizens. The objective of this pilot is to provide an application method for non-U.S. citizens to obtain enumeration services that do not require visiting a local field office.

We will work with our partners in USCIS to implement and evaluate VSD expansion. We conducted a fraud risk assessment to evaluate the specifications and capabilities of VSD technology, and we found no additional risks for using VSD for non-U.S. citizens. We are working with USCIS to update the VSD for Non-U.S. Citizen SSN Replacement Cards agreement. To proceed, SSA and USCIS must arrive at an agreement concerning how we examine DHS issued documents.

The implementation date of the pilot is dependent upon reaching an agreement with USCIS; however, we anticipate release of the test within 90 days of the agreement.

Measure of Success/Metrics

Success of the pilot will be determined by usage rates of VSD by the non-U.S. citizen population for SSN replacement card purposes. We anticipate conducting an evaluation of the pilot 6 months after implementation wherein we will determine the pilot's efficiency and effectiveness by:

- Reviewing weekly totals of SSN replacement cards issued to non-U.S. citizens based on outcomes from appointments using VSD;
- Reviewing the total number of SSN replacement cards issued to non-U.S. citizens based on outcomes from appointments using VSD;
- Conducting a survey of local office management staff at both at a mid-point and an endpoint survey; and
- Conducting a survey with VSD customers regarding their viewpoints on the VSD interview process ([OMB NO. 0960-0818](#)).

CONSULTATIVE EXAMS

In some cases, a claimant does not provide adequate evidence about their impairment(s) to determine whether they are disabled or blind. If we are unable to obtain adequate evidence from the claimant's medical source(s), we may request to purchase a physical or mental examination or test from a medical provider as evidence for the claim. We call these consultative examinations, or CEs.

Since the beginning of FY 2022, the State Disability Determination Services (DDSs) have been focused on increasing the number of active CE providers to replace the CE providers lost in FYs 2020 and 2021. The recruitment efforts of the DDSs led to over a thousand additional CE providers in FY 2022, and around 650 additional CE providers in FY 2023. The higher number of active providers in the network allows us to schedule CEs for all cases that need them and improve overall processing times. Although CE wait times can vary for claimants, in FY 2023, the average time between schedule date and the CE appointment date for cases processed in DCPS2 was 31.8 days—an improvement of over two days from FY 2022.

Table 3.4—FY 2023 Consultative Examination Counts and Cost Data¹

	Annual Number of Cases Completed with at Least One CE²	CE Rate³	CE Costs⁴	CE Costs per Case⁵
National Total (DDS + Federal)	1,175,248	35.50%	\$355,846,315	\$302.78
ALL DDS	1,175,070	36.10%	\$355,857,178	\$302.84
Boston Region	40,675	29.10%	\$11,131,309	\$273.66
CT	10,842	33.40%	\$2,700,679	\$249.09
ME	5,513	31.00%	\$1,432,734	\$259.88
MA	14,467	24.60%	\$4,228,338	\$292.27
NH	4,042	34.50%	\$1,334,062	\$330.05
RI	3,484	27.60%	\$737,775	\$211.76
VT	2,327	37.30%	\$697,721	\$299.84

¹ Extended Service Team (EST) CE data and costs are included in the State amounts (VA, AR, OK). Number of cases include initial disability claims, disability reconsiderations, continuing disability reviews, and disability hearings completed with at least one CE.

² Our systems track the number of cases with at least one paid CE, not the total number of CEs ordered and completed for any given case.

³ CE rate is the number of completed cases for which at least one CE is ordered and paid compared to the total number of completed cases. This rate does not reflect the total volume of CEs ordered and paid. Our systems do not include the level of detail to identify if CEs were conducted by the treating medical provider.

⁴ CE costs represent costs for all CEs, including if there were more than one CE per case.

⁵ CE cost per case represents total CE costs divided by the number of cases with at least one CE.

Limitation on Administrative Expenses

	Annual Number of Cases Completed with at Least One CE²	CE Rate³	CE Costs⁴	CE Costs per Case⁵
New York Region	135,335	47.50%	\$39,939,020	\$295.11
NJ	30,418	38.70%	\$8,360,403	\$274.85
NY	92,907	49.50%	\$28,559,798	\$307.40
PR	12,010	65.70%	\$3,072,551	\$255.83
Philadelphia Region	116,230	32.60%	\$33,515,617	\$288.36
DE	2,715	27.60%	\$1,057,754	\$389.60
DC	3,358	27.80%	\$1,531,429	\$456.05
MD	15,827	39.10%	\$7,272,870	\$459.52
PA	64,753	37.10%	\$15,227,658	\$235.17
VA	17,353	21.80%	\$4,836,785	\$278.73
WV	12,224	46.40%	\$3,589,121	\$293.61
Atlanta Region	286,239	38.70%	\$87,184,756	\$304.59
AL	30,503	41.90%	\$10,389,655	\$340.61
FL	71,297	36.00%	\$21,702,014	\$304.39
GA	38,101	41.80%	\$11,869,408	\$311.52
KY	33,494	41.00%	\$9,090,394	\$271.40
MS	17,176	42.30%	\$4,519,229	\$263.11
NC	40,300	36.80%	\$12,220,424	\$303.24
SC	17,427	30.90%	\$4,652,073	\$266.95
TN	37,941	42.20%	\$12,741,559	\$335.83
Chicago Region	191,358	35.20%	\$55,778,025	\$291.49
IL	40,200	40.20%	\$11,505,952	\$286.22
IN	35,107	46.60%	\$9,654,692	\$275.01
MI	43,646	36.10%	\$12,217,277	\$279.92
MN	11,618	25.40%	\$4,552,061	\$391.81
OH	46,589	30.80%	\$12,533,743	\$269.03
WI	14,198	28.10%	\$5,314,300	\$374.30
Dallas Region	146,059	32.50%	\$38,859,719	\$266.05
AR	16,786	29.50%	\$4,952,282	\$295.02
LA	22,196	39.30%	\$5,384,458	\$242.59
NM	10,380	38.50%	\$3,104,414	\$299.08
OK	23,024	40.70%	\$5,879,319	\$255.36
TX	73,673	32.80%	\$19,539,246	\$265.22
Kansas City Region	48,432	32.30%	\$16,425,486	\$339.15
IA	8,754	26.50%	\$2,947,030	\$336.65
KS	10,253	40.00%	\$4,894,151	\$477.34
MO	24,749	32.10%	\$6,888,313	\$278.33
NE	4,676	32.30%	\$1,695,992	\$362.70

Limitation on Administrative Expenses

	Annual Number of Cases Completed with at Least One CE²	CE Rate³	CE Costs⁴	CE Costs per Case⁵
Denver Region	24,740	31.30%	\$11,597,509	\$468.78
CO	12,344	35.40%	\$5,504,112	\$445.89
MT	2,066	25.30%	\$959,262	\$464.31
ND	1,214	23.40%	\$622,252	\$512.56
SD	1,906	24.00%	\$1,259,695	\$660.91
UT	5,808	30.90%	\$2,381,163	\$409.98
WY	1,402	34.30%	\$871,025	\$621.27
San Francisco Region	149,118	37.80%	\$45,879,271	\$307.67
AZ	22,235	33.90%	\$9,933,806	\$446.76
CA	117,393	39.70%	\$32,565,511	\$277.41
HI	1,425	19.40%	\$608,374	\$426.93
NV	8,065	31.10%	\$2,771,580	\$343.66
Seattle Region	36,884	31.80%	\$15,437,648	\$418.55
AK	1,045	28.90%	\$919,230	\$879.65
ID	4,160	26.00%	\$1,672,411	\$402.02
OR	11,442	28.20%	\$4,204,902	\$367.50
WA	20,237	36.20%	\$8,696,190	\$429.72
Federal	178	0.30%	\$97,954	\$550.30

Limitation on Administrative Expenses

APPROPRIATION HISTORY

The table below includes the amount requested by the President, passed by the House and Senate Committees on Appropriations, and ultimately appropriated for the LAE account, including any rescissions and supplemental appropriations, for the last 10 years. The annual appropriation includes amounts authorized from SSI State Supplement user fees and non-attorney representative user fees.

Table 3.5—Appropriation History Table

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
2015	\$12,024,000,000 ¹	--- ²	--- ³	\$11,805,945,000 ⁴
2016	\$12,513,000,000 ⁵	\$11,817,945,000 ⁶	\$11,620,945,000 ⁷	\$12,161,945,000 ⁸
2017	\$13,067,000,000 ⁹	\$11,898,945,000 ¹⁰	\$12,481,945,000 ¹¹	\$12,481,945,000 ¹²
2018	\$12,457,000,000 ¹³	\$12,392,945,000 ¹⁴	\$11,992,945,000 ¹⁵	\$12,872,945,000 ¹⁶
2019	\$12,393,000,000 ¹⁷	\$12,557,045,000 ¹⁸	\$12,951,945,000 ¹⁹	\$12,876,945,000 ²⁰
2020	\$12,773,000,000 ²¹	\$13,071,945,000 ²²	--- ²³	\$12,870,945,000 ²⁴
CARES Act ²⁵				\$338,000,000
Final				\$13,208,945,000
2021	\$13,351,473,000 ²⁶	\$12,970,945,000 ²⁷	--- ²⁸	\$12,930,945,000 ²⁹
Supplemental ³⁰				\$38,000,000
Final				\$12,968,945,000
2022	\$14,188,896,000 ³¹	\$14,066,945,000 ³²	--- ³³	\$13,341,945,000 ³⁴
2023	\$14,773,300,000 ³⁵	\$14,441,945,000 ³⁶	--- ³⁷	\$14,126,978,000 ³⁸
2024	\$15,489,200,000 ³⁹	\$13,953,978,000 ⁴⁰	\$14,418,978,000 ⁴¹	--- ⁴²
2025	\$15,401,924,000 ⁴³			

¹ Total included \$1,396,000,000 in dedicated funding designated for SSI redeterminations and CDRs – \$273,000,000 in base funding and \$1,123,000,000 in funds outside the discretionary caps as authorized by the Budget Control Act (BCA) of 2011 (P.L. 112-25), as well as \$131,000,000 from LAE to assist in program integrity work. Included up to \$124,000,000 from user fees paid by States for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

² The House Committee on Appropriations did not report a bill.

³ The Senate Committee on Appropriations did not report a bill.

⁴ Consolidated and Further Continuing Appropriations Act, 2015 (P.L. 113-235). Total included \$1,396,000,000 designated for SSI redeterminations and CDRs. Included up to \$124,000,000 from user fees paid by States for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

⁵ Total included \$1,439,000,000 in dedicated funding designated for SSI redeterminations and CDRs – \$273,000,000 in base funding and \$1,166,000,000 in funds outside the discretionary caps as authorized by the BCA of 2011. Included up to \$136,000,000 from user fees paid by States for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

⁶ H.R. 3020.

⁷ S.1695.

⁸ Consolidated Appropriations Act, 2016 (P.L. 114-113). Total included \$1,426,000,000 in funding designated for SSI redeterminations and CDRs. Included up to \$124,000,000 from user fees paid by States for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

⁹ The FY 2017 request included \$1,819,000,000 in dedicated program integrity funding for, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, cooperative disability investigation (CDI) units, and the prosecution of fraud by Special Assistant United States Attorneys (SAUSAs), comprised of \$273,000,000 in base funding and \$1,546,000,000 in funds outside the discretionary caps as authorized by the Bipartisan Budget Act (BBA) of 2015 (P.L. 114-74). Additionally, the LAE account carved out funding to support the fully loaded costs of performing 1.1 million CDRs and approximately 2.8 million SSI redeterminations, \$126,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

¹⁰ H.R. 5926.

¹¹ S. 3040.

¹² Consolidated Appropriations Act, 2017 (P.L. 115-31). Total included \$90,000,000 in available funding through September 30, 2018, for activities to address the hearings backlog within the Office of Hearings Operations (formerly the Office of Disability Adjudication and Review). Included \$1,819,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,546,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74) to remain available until March 31, 2018. Included \$123,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

¹³ The FY 2018 request included \$1,735,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,462,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74). Included up to \$118,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

¹⁴ H.R.3358.

¹⁵ S. 1771.

¹⁶ Consolidated Appropriations Act, 2018 (P.L. 115-141). Total included \$280,000,000 to remain available until expended for information technology modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with information technology modernization. Total included \$100,000,000 in available funding through September 30, 2019, for activities to address the hearings backlog within the Office of Hearings Operations. Included \$1,735,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,462,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74) to remain available for 18 months through March 31, 2019. Included \$118,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

¹⁷ The FY 2019 request included \$1,683,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,410,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74) to remain available until March 31, 2020. Beginning in FY 2019, the Budget proposed that we may transfer up to \$10,000,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. Included up to \$134,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

¹⁸ H.R. 6470.

¹⁹ S. 3158.

²⁰ Department of Defense and Labor, Health and Human Services, and Education Appropriations Act, 2019 and

Limitation on Administrative Expenses

Continuing Appropriations Act, 2019 (P.L. 115-245). Total included \$45,000,000 to remain available until expended for information technology modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with information technology modernization. Total included \$100,000,000 in available funding through September 30, 2020, for activities to address the hearings backlog within the Office of Hearings Operations. Included \$1,683,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,410,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74) to remain available for 18 months through March 31, 2020. Public Law 115-245 allowed us to transfer up to \$10,000,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units in FY 2019. Included \$134,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

²¹ The FY 2020 Budget proposed that the total LAE budget authority request of \$12,773,000,000 be offset by fees collected for replacement Social Security cards (estimated at \$270,000,000). The total included \$1,582,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,309,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74) to remain available until March 31, 2021. In FY 2020, the Budget proposed to transfer up to \$10,000,000 of program integrity cap adjustment funds in the LAE account to the OIG for the costs associated with jointly operated CDI units. Included up to \$130,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

²² H.R. 2740.

²³ The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which provided the FY 2020 President's Budget request of \$12,773,000,000.

²⁴ Further Consolidated Appropriations Act, 2020 (P.L. 116-94). The total included \$45,000,000 to remain available until expended for IT modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with IT modernization. The total included \$100,000,000 in available funding through September 30, 2021, for activities to address the hearings backlog within the Office of Hearings Operations. The total also included \$1,582,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,309,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74) to remain available for 18 months through March 31, 2021. P.L. 116-94 allowed us to transfer up to \$10,000,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units in FY 2020. The total also included \$130,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

²⁵ The Coronavirus Aid, Relief, and Economic Security (CARES) Act (P.L. 116-136) provided \$300,000,000 in funding, available through September 30, 2021, to prevent, prepare for, and respond to the coronavirus, including paying the salaries and benefits of all employees affected as a result of office closures, telework, phone and communication services for employees, overtime costs, supplies, and for resources necessary for processing disability and retirement workloads and backlogs. It also provided \$38,000,000 for administrative costs related to assisting the Department of Treasury/Internal Revenue Service in coordinating a public awareness campaign and administering economic impact payments (EIPs) to qualifying individuals.

²⁶ The FY 2021 Budget proposed that the total requested LAE budget authority of \$13,351,473,000 be offset by fees collected for replacement Social Security cards (estimated at \$270,000,000). The total included \$1,575,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,302,000,000 in funds outside the discretionary caps, as authorized by the BBA of 2015 (P.L. 114-74) to remain available until March 31, 2022. The Budget proposed allowing us to transfer up to \$11,200,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units in FY 2021. The total included up to \$135,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

²⁷ H.R. 7614.

²⁸ The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which

included \$12,868,945,000 for LAE.

²⁹ Consolidated Appropriations Act, 2021 (P.L. 116-260). The total included \$45,000,000 to remain available until expended for IT modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with IT modernization. The total included \$50,000,000 in available funding through September 30, 2022, for activities to address the hearings backlog within the Office of Hearings Operations. The total also included \$1,575,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,302,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74) to remain available for 18 months through March 31, 2022. P.L. 116-260 allowed for the transfer of up to \$11,200,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total also included \$135,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

³⁰ The Consolidated Appropriations Act, 2021 (P.L. 116-260, Section 272, Division N) provided \$38,000,000 in funding, available through September 30, 2021, for administrative costs related to assisting the Department of Treasury/Internal Revenue Service in coordinating a public awareness campaign and administering a second round of EIPs first authorized under the CARES Act.

³¹ The FY 2022 Budget proposed \$1,708,000,000 in dedicated program integrity funding, including a \$1,435,000,000 allocation adjustment, to remain available until March 31, 2023. Dedicated program integrity funding allowed us to conduct CDRs and SSI redeterminations to confirm that participants remain eligible to receive benefits, and it supported anti-fraud cooperative disability investigation units and special attorneys for fraud prosecutions. The Budget proposed transferring up to \$12,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total included up to \$138,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

³² H.R. 4502.

³³ The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which included \$13,967,945,000 for LAE.

³⁴ Consolidated Appropriations Act, 2022 (P.L. 117-103). The total included \$55,000,000 in available funding through September 30, 2023, for activities to address the hearings backlog within the Office of Hearings Operations. The total also included \$1,708,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of \$273,000,000 in base funding and \$1,435,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L. 114-74) to remain available for 18 months through March 31, 2023. P.L. 117-103 allowed us the ability to transfer up to \$12,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total also included \$138,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

³⁵ The FY 2023 Budget proposed \$1,799,000,000 in dedicated program integrity funding, including a \$1,511,000,000 allocation adjustment, to remain available until March 31, 2024. Dedicated program integrity funding allowed us to conduct CDRs and SSI redeterminations to confirm that participants remain eligible to receive benefits, and it supported anti-fraud cooperative disability investigation units and special attorneys for fraud prosecutions. The Budget proposed transferring up to \$15,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total included up to \$140,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

³⁶ H.R. 8295.

³⁷ The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which included \$14,244,014,000 for LAE.

³⁸ Consolidated Appropriations Act, 2023 (P.L. 117-328). The total includes \$55,000,000 in available funding through September 30, 2024, for activities to address the disability hearings backlog within the Office of Hearings Operations. The total also includes \$1,784,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution

Limitation on Administrative Expenses

of fraud by SAUSAs, comprised of \$273,000,000 in base funding and a \$1,511,000,000 allocation adjustment to remain available for 18 months through March 31, 2024. P.L. 117-328 provides a transfer of up to \$15,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total also includes \$140,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

³⁹ The FY 2024 Budget includes \$50,000,000 in no-year funding in the LAE account to modernize our benefits system. The FY 2024 Budget also includes \$2,000,000 for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure available through September 30, 2025, of which, \$700,000 is for the OIG for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure. The FY 2024 Budget proposed \$1,870,000,000 in dedicated program integrity funding, including \$287,000,000 in base program integrity funding and a \$1,583,000,000 allocation adjustment, to remain available until March 31, 2025. Dedicated program integrity funding allows us to conduct CDRs and SSI redeterminations to confirm that participants remain eligible to receive benefits, and it supports anti-fraud CDI units and SAUSAs for fraud prosecutions. The Budget proposed transferring \$19,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total included up to \$150,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

⁴⁰ H.R. 5894. The House bill was passed at the subcommittee level and did not go to the full committee.

⁴¹ S. 2624

⁴² A full-year appropriation for FY 2024 was not enacted at the time the FY 2025 President's Budget was prepared. 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. The SSA Congressional Justification assumes a \$19,100,000 transfer from the LAE account to the OIG for costs associated with jointly operated CDI unit costs in FY 2024, the same as the 2024 Budget. See the Program Integrity exhibit in the LAE section for more information. Further, the FY 2024 CR funding level includes \$55,000,000 to address the disability hearings backlog, which is included in regular LAE. Lastly, the FY 2024 CR funding level also includes up to \$140,000,000 for SSI State Supplement user fees and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

⁴³ The FY 2025 Budget includes \$50,000,000 in no-year funding in the LAE account to modernize our benefits system. The FY 2025 Budget also includes \$2,000,000 for the purchase and hire of zero emission vehicles and supporting charging or fueling infrastructure available through September 30, 2026, of which \$700,000 is for the OIG for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure. The FY 2025 Budget proposes \$1,903,000,000 in dedicated program integrity funding, including \$273,000,000 in base program integrity funding and a \$1,630,000,000 cap adjustment, to remain available until March 31, 2026. Dedicated program integrity funding allows us to conduct CDRs and SSI redeterminations to confirm that participants remain eligible to receive benefits, and it supports anti-fraud CDI units and SAUSAs for fraud prosecutions. The Budget proposes transferring \$19,600,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total includes up to \$170,000,000 for SSI State Supplement user fees, and up to \$1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

SSA-RELATED LEGISLATION FROM APRIL 2023 TO MARCH 2024

FY 2024

Further Continuing Appropriations and Other Extensions Act, 2024 (P.L. 118-22, enacted November 16, 2023)

- The law provides continuing FY 2024 appropriations for four FY 2023 appropriations acts through January 19, 2024. For most other federal agencies and programs, including SSA, the law provides funding through February 2, 2024.
- The law also extends several expiring programs and authorities, including programs authorized by the 2018 farm bill and several public health programs.

FY 2023

Continuing Appropriations Act, 2024 and Other Extensions Act (P.L. 118-15, enacted September 30, 2023)

- The law provided continuing FY 2024 appropriations to federal agencies through November 17, 2023, and provided emergency funding for disaster relief.
- The law also extended several expiring programs and authorities.

Providing Accountability Through Transparency Act of 2023 (P.L. 118-9, enacted July 25, 2023)

- The law requires the notice of a proposed rule by a federal agency to include the internet address of a summary of the rule. The summary of the rule must be 100 words or fewer, written in plain language, and posted on regulations.gov.

Fiscal Responsibility Act of 2023 (P.L. 118-5, enacted June 3, 2023)

- The law increases the federal debt limit, establishes new discretionary spending limits, rescinds unobligated funds, and expands work requirements for federal programs.
- Specifically, the law establishes new discretionary spending limits that are permitted under current law to accommodate additional appropriations for SSA's Program Integrity work.
- The law also modifies other requirements related to the federal budget process.

Relating to a National Emergency Declared by the President on March 13, 2020 (P.L. 118-3, enacted April 10, 2023)

- The law terminates the national emergency concerning COVID-19 declared by the President on March 13, 2020.

Limitation on Administrative Expenses

GENERAL STATEMENT/BUDGETARY RESOURCES/PERFORMANCE

LIMITATION ON ADMINISTRATIVE EXPENSES OVERVIEW

The LAE account funds our operating expenses to administer our programs: the OASI and DI programs, the SSI program, certain health insurance and Medicare prescription drug functions, and the Special Benefits for Certain World War II Veterans program. The LAE account provides the funds we need to perform our core responsibilities, including processing benefit applications, conducting hearings and appeals, ensuring we distribute benefits properly, and maintaining the integrity of the trust funds. With these funds, we deliver service to millions of Americans online at www.socialsecurity.gov, on the telephone, and through our field offices.

Please see the Budget Overview for more information.

KEY PRIORITIES

We formulated our FY 2025 President’s Budget request to strengthen and improve our services, rebuild and support our workforce, and deliver accessible, high-quality, customer-centered services to all we serve. Our highest customer service priorities include improving National 800 Number customer wait times, reducing the average processing time for disability determinations, and improving payment accuracy and processes to improve the customer experience for both overpayments and underpayments.

Our request includes over \$2.8 billion for the State disability determination services (DDS), an increase of about \$180 million from our FY 2024 estimated level. This amount restores staff to FY 2023 levels and includes the necessary pay increases to improve workforce recruitment and retention so that we can process more disability claims and reduce the time claimants wait for a decision. Our request also includes increases of nearly \$700 million for Federal payroll costs to restore staffing to FY 2023 levels and increase overtime, over \$200 million to modernize our information technology services, and \$50 million for program integrity. Funding these investments will improve our frontline operations by strengthening our workforce, allowing us to reduce backlogs and wait times, enhance customer service, expand program access, modernize our information technology, and position SSA to provide the level of service our customers expect and deserve going into the future.

As reflected in our Budget Overview, the President’s Budget request addresses the following key areas:

- Optimizing the experience of SSA customers, including:
 - Identifying and addressing barriers to accessing our services by:
 - Eliminating service disparities for people with disabilities; and
 - Increasing SSI program outreach to underserved communities.
 - Expanding our digital services by:
 - Expanding online self-scheduling options to the public;
 - Expanding video service options for hearings, interviews for replacement cards, and post-entitlement actions;
 - Increasing the number of services and forms available on our secure digital platforms; and
 - Continuing the rollout of a mobile-accessible, online process to upload forms, evidence, documentation, or correspondence and electronically sign documents.
 - Building a customer-focused organization by:
 - Reducing the initial disability claims backlog;
 - Eliminating the disability hearings backlog;
 - Improving National 800 Number service;
 - Strengthening service in our field offices;
 - Addressing processing center backlogs; and
 - Modernizing our information technology.

Limitation on Administrative Expenses

- Building an inclusive, engaged, and empowered workforce, including:
 - Promoting diversity, equity, inclusion, and accessibility in hiring and advancement by:
 - Expanding manager recruitment capabilities by utilizing Office of Personnel Management special hiring authorities such as direct hiring authority for approved mission-critical vacancies and increasing internship opportunities; and
 - Leveraging partnerships with universities and institutions that specifically work with underserved communities.
 - Supporting employees' chosen career paths by:
 - Investing in training and development opportunities to develop new leaders, enhance employee engagement, increase productivity, and improve retention; and
 - Implementing an updated agency-level Improve Workplace Morale plan.
- Ensuring stewardship of our programs, including:
 - Improving the accuracy and administration of our programs by:
 - Supporting our cost-effective program integrity work;
 - Enhancing our payment accuracy efforts (see our Improper Payments exhibit);
 - Enhancing our fraud prevention and detection activities;
 - Addressing the climate crisis;
 - Leverage artificial intelligence to improve operations; and
 - Investing in cybersecurity to safeguard our data.
 - Identifying and eliminating potential barriers and bolstering open competition for contracts and grants by developing best practices to:
 - Encourage participation by Historically Black Colleges and Universities and Institutions Serving Students of Color; and
 - Secure contracts with qualified Historically Underutilized Business Zone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses.
 - Improving organizational performance and policy implementation by:
 - Simplifying our policies and procedures, especially in the complex SSI program.
 - Enhancing our disability determination and hearings and appeals case processing systems; and
 - Expanding strategic relationships with Federal, State, and private partners.
- Looking towards the future by exploring other Administration initiatives that would:
 - Protect the benefits that Americans have earned; and
 - Provide national, comprehensive paid family and medical leave.

SIZE AND SCOPE OF OUR PROGRAMS

Our administrative budget is driven by the programs we administer—both in terms of the amount of work performed and the number of people needed to process it—and by our continuing efforts to improve service, efficiency, and stewardship.

Between the three major programs we administer—OASI, DI, and SSI—benefit payment outlays totaled over \$1.4 trillion in FY 2023; under current law, we expect benefit payment outlays to be approximately \$1.5 trillion in FY 2024 and \$1.6 trillion in FY 2025. This includes the SSI State supplementary payments that we administer on behalf of some States. Our administrative expenses¹ of \$15.4 billion are about one percent of total benefit payment outlays and continue to be a small fraction of overall program spending, demonstrating our cost-conscious approach to managing resources.

Table 3.6—Benefit Outlays²
(Dollars in billions)

	FY 2023 Actuals	FY 2024 Estimate	FY 2025 Estimate
Old-Age and Survivors Insurance	\$1,192.1	\$1,291.3	\$1,375.7
Disability Insurance	\$149.4	\$153.5	\$160.6
Supplemental Security Income ^{3,4}	\$63.2	\$60.4	\$66.6
Total Outlays⁵	\$1,404.7	\$1,505.1	\$1,602.9

We expect the total number of beneficiaries and recipients of the three major programs we administer to increase from 73.8 million in FY 2023 to 74.8 million in FY 2024 and 76.1 million in FY 2025. We expect OASI beneficiaries to increase in FY 2024 and FY 2025, while we expect DI beneficiaries and SSI recipients to slightly decrease in FY 2024 and FY 2025.

Table 3.7—Beneficiaries²
(Average in payment status, in millions)

	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate
Old-Age and Survivors Insurance	57.5	58.9	60.2
Disability Insurance	8.8	8.5	8.4
Supplemental Security Income ⁶	7.5	7.4	7.4
Total Beneficiaries⁷	73.8	74.8	76.1

¹ Our calculation of discretionary administrative expenses excludes Treasury administrative expenses, which are mandatory outlays.

² Totals may not add due to rounding.

³ SSI benefit payments include State supplementary payments of around \$3.1 billion in FYs 2023 and 2024 and nearly \$3.5 billion in FY 2025.

⁴ There were 12 monthly benefit payments in FY 2023, and there will be 11 in FY 2024 and 12 in FY 2025.

⁵ Benefit payment totals include less than \$500,000 for the Special Benefits for Certain World War II Veterans program in FYs 2023, 2024, and 2025, which is not broken out separately.

⁶ SSI recipients include about 134,000 in FY 2023, 135,000 in FY 2024, and 137,000 in FY 2025 who only receive a State supplementary payment.

⁷ Beneficiary totals include approximately 2.5 million concurrent recipients who receive SSI as well as OASI or DI.

Limitation on Administrative Expenses

FUNDING REQUEST

Our FY 2025 LAE budget request of \$15.402 billion allows us to focus on our agency priorities of strengthening our services, modernizing our information technology services and systems for the future, streamlining our policies, improving the customer experience and equity across all programs, preventing and resolving improper payments, investing in our workforce, and ensuring stewardship of our programs.

Table 3.8—Budgetary Request¹
(Dollars in Millions)

	FY 2023 Enacted	FY 2024 Estimate²	FY 2025 Request
Budget Authority, One-Year (Dollars in Millions)			
Limitation on Administrative Expenses (LAE) ^{3,4} <i>(Dedicated Program Integrity, Base and Allocation/Cap Adjustment, included in LAE⁵)</i>	\$14,127 <i>(\$1,784)</i>	\$14,194 <i>(\$1,851)</i>	\$15,402 <i>(\$1,903)</i>
Research and Demonstrations ^{6,7}	\$86	\$86	\$91
Office of the Inspector General (OIG) ⁸	\$115	\$115	\$121
Total, Budget Authority	\$14,328	\$14,395	\$15,614
Workyears (WY)			
Full-Time Equivalents ⁹	58,485	57,490	59,211
Overtime	2,782	1,800	2,167
Lump Sum Leave	150	242	242
Total SSA Workyears¹⁰	61,417	59,532	61,620
Disability Determination Services (DDS)	13,554	13,364	13,555
Total SSA/DDS Workyears	74,971	72,896	75,175
OIG	501	517	532
Total SSA/DDS/OIG Workyears¹¹	75,472	73,413	75,707

¹ Numbers may not add due to rounding.

² Our regular LAE funding level in FY 2024 assumes level funding of the annual appropriations included in 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.

³ 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.

⁴ P.L. 117-328 – Consolidated Appropriations Act, 2023, provided \$55 million in dedicated funding to address the hearings backlog.

⁵ P.L. 117-328 – Consolidated Appropriations Act 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.

⁶ These amounts include \$7 million in base research funding classified as mandatory.

⁷ Congress appropriated \$86 million in three-year authority in both FY 2023 and FY 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).

⁸ 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.

⁹ Full-time equivalents include those funded by the CDI unit PI transfer from the LAE account to the OIG.

¹⁰ 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.

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

Limitation on Administrative Expenses

ALL PURPOSE TABLE

Table 3.9—All Purpose Table (APT)

(in thousands)

	FY 2023	FY 2024	FY 2025	
	Consolidated Appropriations Act ^{1,2}	Estimate ³	President's Budget ⁴	FY 2025 +/- FY 2024
Payments to Social Security Trust Funds				
Pension Reform	6,000	6,000	6,000	-
Unnegotiated Checks	5,000	5,000	9,000	4,000
Total PTF	\$11,000	\$11,000	\$15,000	\$4,000
Supplemental Security Income				
Federal Benefits Payment	59,230,213	59,477,435	63,108,000	3,630,565
Beneficiary Services	124,000	124,000	144,000	20,000
Research & Demonstration ^{5,6}	86,000	86,000	91,000	5,000
Administration ⁷	4,769,125	4,521,903	4,912,635	390,732
Subtotal SSI Program Level	64,209,338	64,209,338	68,255,635	4,046,297
Advance from PY	(15,600,000)	(15,800,000)	(21,700,000)	(5,900,000)
Subtotal Current Year SSI	\$48,609,338	\$48,409,338	\$46,555,635	(\$1,853,703)
New Advance SSI	\$15,800,000	\$21,700,000	\$22,100,000	\$400,000
Limitation on Administrative Expenses				
Regular LAE				
OASDI Trust Funds	5,793,240	5,754,902	6,082,379	394,477
HI/SMI Trust Funds	3,072,618	3,425,792	3,888,986	463,194
Social Security Advisory Board	2,700	2,700	3,150	450
SSI	3,333,420	3,018,584	3,353,410	334,826
Subtotal Regular LAE	\$12,201,978	\$12,201,978	\$13,327,924	\$1,192,946
Program Integrity Funding				
OASDI Trust Funds	348,296	347,681	343,775	(3,907)
SSI	1,435,704	1,503,319	1,559,225	55,907
Subtotal Program Integrity Funding⁸	\$1,784,000	\$1,851,000	\$1,903,000	\$52,000
<i>Base Program Integrity⁹</i>	<i>273,000</i>	<i>273,000</i>	<i>273,000</i>	-
<i>Cap/Allocation Adjustment⁹</i>	<i>1,511,000</i>	<i>1,578,000</i>	<i>1,630,000</i>	<i>52,000</i>
User Fees				
SSI User Fee	140,000	140,000	170,000	30,000
SSPA User Fee	1,000	1,000	1,000	-
Subtotal User Fees	\$141,000	\$141,000	\$171,000	\$30,000
Total LAE	\$14,126,978	\$14,193,978	\$15,401,924	\$1,274,946
Non-PI LAE	12,342,978	12,342,978	13,498,924	1,222,946
Office of the Inspector General				
Federal Funds	32,000	32,000	34,000	2,000
Trust Funds	82,665	82,665	87,254	4,589
Total, OIG¹⁰	\$114,665	\$114,665	\$121,254	\$6,589
Total, Social Security Administration, New BA	\$73,892,856	\$79,907,078	\$79,281,178	(\$558,900)
Federal Funds	\$64,593,338	\$70,293,338	\$68,875,635	(\$1,417,703)
Current Year	\$48,793,338	\$48,593,338	\$46,775,635	(\$1,817,703)
New Advance	\$15,800,000	\$21,700,000	\$22,100,000	\$400,000
Trust Funds	\$9,299,518	\$9,613,740	\$10,405,543	\$858,803

¹ P.L. 117-328 – Consolidated Appropriations Act, 2023, provided \$55,000,000 in dedicated funding to address the hearings backlog. It is included in regular LAE.

Limitation on Administrative Expenses

-
- ² The Federal Benefits Payment, regular LAE, and the program integrity program splits included in this APT are slightly different than the amounts reported in the FY 2023 Consolidated Appropriations Act report language because of actual spending by program. However, subtotal SSI program and total LAE included in this APT and the report language are the same.
- ³ Our regular LAE funding level in FY 2024 assumes a full-year continuing resolution, at an annualized rate equal to the enacted FY 2023 appropriations. 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. New Advance SSI (\$21,700,000,000) reflects the current estimate to ensure sufficient and timely FY 2025 first quarter benefit payments in the event of a delayed appropriations. The FY 2024 CR funding level also includes \$55,000,000 to address the disability hearings backlog, which is included in regular LAE. LAE program funding splits have been updated to reflect current information and will not match the FY 2023 Consolidated Appropriations Act level.
- ⁴ The FY 2025 President's Budget includes \$50,000,000 in no-year funding in the LAE account to modernize our benefits system. The FY 2025 Budget also includes \$2,000,000 for the purchase and hire of zero emission vehicles and supporting charging or fueling infrastructure available through September 30, 2026, of which \$700,000 is for the OIG for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure.
- ⁵ These amounts include \$7,000,000 in base research funding classified as mandatory.
- ⁶ FY 2023 Congress appropriated 3-year authority for research and demonstration projects, and we request the same authority for FY 2024 and FY 2025.
- ⁷ Total SSI Administration reflects the sum of SSI regular LAE and SSI Program Integrity included in the LAE section.
- ⁸ P.L. 117-328 – Consolidated Appropriations Act, 2023, provided 18-month (through March 31, 2024) authority for program integrity funding. The FY 2025 President's Budget assumes similar 18-month authority to obligate PI funds.
- ⁹ P.L. 117-328 allows SSA to transfer \$15,100,000 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 \$19,100,000 transfer in FY 2024, the same level as in the FY 2024 President's Budget, and requests a \$19,600,000 transfer for FY 2025.
- ¹⁰ Includes \$2,000,000 annually in the OIG topline, to remain available until expended for information technology modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with information technology modernization.

Limitation on Administrative Expenses

SSI STATE SUPPLEMENTATION/IMPACT OF STATES DROPPING OUT

The SSI program was designed to provide a nationwide uniform floor of cash assistance to individuals who are aged, blind, and disabled, with limited income and resources. In recognizing that there were variations in living costs across the Nation, Congress added section 1618 to the Social Security Act to encourage States to supplement the Federal payment. This ensured that SSI recipients received the full benefit of each cost-of-living adjustment. States may administer their own State supplement programs or have us administer the programs on their behalf. States electing to have us administer their programs reimburse us monthly in advance for these benefit payments, and we make eligibility determinations and payments on behalf of the States.

Table 3.10—State Supplement Payments
(Dollars in millions)

	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate
Federally Administered State Supplement Payments	\$3,123	\$3,140	\$3,475
Offsetting Collections	\$3,118	\$3,383	\$3,481

Participating States pay us user fees to administer their programs, based on a schedule established by the Social Security Act. The user fee was \$14.35 per SSI check payment in FY 2023 and is \$14.78 in FY 2024. We estimate that the user fee will increase to \$15.22 per payment in FY 2025. The Department of Treasury receives the first \$5.00 of each fee and we retain the amount over \$5.00. This user fee is discretionary budget authority that supplements our LAE account.

Table 3.11—SSI User Fee Collections^{1,2}
(Dollars in millions)

	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	<i>FY 2024 to FY 2025 Change</i>
SSA User Fee Collections	\$152	\$147	\$170	+\$23
Treasury User Fee Collections	\$81	\$75	\$82	+\$7
Total User Fee Collections	\$233	\$222	\$252	+\$30

¹ The enacted user fee authority for FY 2023 was \$140,000,000 and for FY 2024 is the annualized continuing resolution amount of \$140,000,000. Any fees collected in excess of the appropriated amount may be used to cover a shortfall in collections for future years.

² FY 2023 had 12 payments, FY 2024 has 11 payments, and FY 2025 has 12 payments.

Impact of States Dropping Out of State Supplementation Program

Currently, we help administer the State supplementation for 20 States and the District of Columbia. However, participation in the State supplementation program is voluntary. States can opt out of the program but must provide notice to us at least 90 days in advance before dropping out. The result of States dropping out of the program is a loss of LAE authority in the current and possibly following fiscal year when it is too late to adjust our request. When a State drops out of the program, we use LAE to make up the difference in authority. We adjust our estimates for the budget year and the outyears, when possible, to accommodate any changes. California and New Jersey are the two States with the highest collections for whom we administer State supplementation. If either State opted to administer their own State supplementation, our estimate would dramatically decrease.

Table 3.12—Estimated SSA User Fee Collections by State
(Dollars in thousands)

State	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate
Arkansas	*	*	*
California	\$128,250	\$123,621	\$143,330
Delaware	\$58	\$55	\$63
DC	\$117	\$112	\$127
Georgia	\$1	\$1	\$1
Hawaii	\$251	\$241	\$273
Iowa	\$111	\$106	\$121
Kansas	*	*	*
Louisiana	*	*	*
Maryland	*	*	*
Michigan	\$1,196	\$1,147	\$1,302
Mississippi	\$1	\$1	\$1
Montana	\$72	\$69	\$78
Nevada	\$1,798	\$1,723	\$1,956
New Jersey	\$18,064	\$17,983	\$20,413
Ohio	*	*	*
Pennsylvania	\$502	\$481	\$546
Rhode Island	\$38	\$36	\$41
South Dakota	*	*	*
Tennessee	\$1	\$1	\$1
Vermont	\$1,604	\$1,538	\$1,746
Total	\$152,064	\$147,000	\$170,000

* Less than \$500

Limitation on Administrative Expenses

BUDGET AUTHORITY AND OUTLAYS

The Limitation on Administrative Expenses (LAE) account, our basic administrative account, is an annual appropriation and is financed from the Social Security and Medicare trust funds, the General Fund, and applicable user fees. This account provides resources to administer the Social Security and Supplemental Security Income (SSI) programs, as well as certain aspects of the Medicare program. We calculate the administrative costs attributable to each program using our Government Accountability Office approved Cost Analysis System (CAS).

In addition to our base operating expenses, we occasionally receive one-time appropriations. In FY 2009, we received additional funds from the General Fund of the Treasury, provided by the Recovery Act and the Medicare Improvement for Patients and Providers Act (MIPPA). We also received \$98 million funded incrementally from FY 2015 to FY 2018, of which \$27 million is available until expended, for costs associated with the Medicare Access and CHIP Reauthorization Act (MACRA) provisions. In FY 2020 and FY 2021, we received a total of \$376 million to prevent, prepare for, and respond to the coronavirus pandemic. In FY 2022, we received \$16 million for the Postal Service Reform Act (PSRA) to assist the Office of Personnel Management (OPM) and the United States Postal Service (USPS) with outreach, program eligibility and inquiries, and administering a special Medicare enrollment period for Postal Service employees, Postal Service annuitants and their family members.

We received a total of \$23.3 million, split between \$15 million in FY 2023 and \$8 million in FY 2024, in Technology Modernization Funds (TMF) to accelerate our Multifactor Authentication project to further improve our information security posture and reduce risks from compromised credentials.

Centers for Medicare and Medicaid Services (CMS) and SSA Cost Sharing Agreement Workgroup

Section 201(g) of the Social Security Act provides that SSA determine the share of administrative expenses that should have been borne by the appropriate trust funds for the administration of their respective programs and the General Fund for administration of the SSI program. SSA and CMS continue to work together to evaluate the cost-sharing agreement that determines the portion of administrative expenses borne by the SSA and Medicare trust funds and the General Fund.

Table 3.13—Budget Authority and Outlays¹
(Dollars in thousands)

	FY 2023 Actual ^{2,3,4}	FY 2024 Estimate ^{3,5}	FY 2025 Estimate ^{6,7}
Budget Authority			
OASI and DI Trust Funds	\$6,141,535 ⁸	\$6,102,583 ⁹	\$6,426,153 ¹⁰
HI and SMI Trust Funds	\$3,072,618	\$3,425,792	\$3,888,986

Limitation on Administrative Expenses

	FY 2023 Actual ^{2,3,4}	FY 2024 Estimate ^{3,5}	FY 2025 Estimate ^{6,7}
SSA Advisory Board	\$2,700	\$2,700	\$3,150
SSI Administrative Expenses	\$4,769,125	\$4,521,903	\$4,912,635 ¹⁰
SSI State Supplement User Fees	\$140,000	\$140,000	\$170,000
Non-Attorney Representative User Fees	\$1,000	\$1,000	\$1,000
Technology Modernization Funds (TMF)	\$15,300	\$8,000	\$0
Total Budget Authority	\$14,142,278	\$14,201,978	\$15,401,924
Administrative Outlays			
OASI and DI Trust Funds	\$5,968,000 ¹¹	\$6,167,000 ¹²	\$6,450,000 ¹³
HI and SMI Trust Funds	\$3,232,000	\$3,499,000	\$3,902,000
SSI Administrative Expenses	\$4,485,000	\$4,621,000	\$4,928,000
SSI State Supplement User Fees	\$140,000	\$140,000	\$170,000
Non-Attorney Representative User Fees	\$1,000	\$1,000	\$1,000
CARES Act	\$200	\$0	\$0
MIPPA – LIS	\$0 ¹⁴	\$0	\$0
Postal Service Recovery Act (PSRA)	\$1,000	\$6,000	\$9,000
Technology Modernization Fund (TMF)	\$1,000	\$22,000	\$0
Total Administrative Outlays¹⁵	\$13,828,200	\$14,456,000	\$15,460,000

¹ Totals may not add due to rounding.

² In FY 2023, our administrative outlays were about 1 percent of the benefit payments we made.

³ Congress appropriated \$55,000,000 in FY 2023 (available until September 30, 2024) to address the disability hearings backlog within OHO. The FY 2024 CR funding level also includes \$55 million to address the disability hearings backlog within OHO.

⁴ The Coronavirus Aid, Relief, and Economic Security (CARES) Act (P.L. 116-136) provided \$300,000,000 in funding, available through September 30, 2021, to prevent, prepare for, and respond to the coronavirus pandemic. It also provided \$38,000,000 for administrative costs related to assisting the Department of Treasury/Internal Revenue Service in coordinating a public awareness campaign and administering economic impact payments (EIP) to most individuals. The Consolidated Appropriations Act, 2021, provided an additional \$38,000,000 in funding, available through September 30, 2021, for administrative costs related to assisting the Department of Treasury/Internal Revenue Service.

Limitation on Administrative Expenses

⁵ In FY 2024, our administrative outlays are about 1 percent of the benefit payments we plan to pay.

⁶ In FY 2025, our administrative outlays are about 1 percent of the benefit payments we plan to pay.

⁷ The FY 2025 Budget includes \$50,000,000 in no-year funding to modernize our benefits system. It also includes \$2,000,000 for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure available through September 30, 2026, of which \$700,000 is for the OIG for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure.

⁸ The total includes \$3,386,775 in OASI and \$2,754,760 in DI budget authority.

⁹ The total includes \$3,639,048 in OASI and \$2,463,535 in DI budget authority.

¹⁰ The total includes \$3,807,826 in OASI and \$2,618,327 in DI budget authority.

¹¹ The total includes \$3,544,000 in OASI and \$2,424,000 in DI outlays.

¹² The total includes \$3,678,000 in OASI and \$2,489,000 in DI outlays.

¹³ The total includes \$3,823,000 in OASI and \$2,627,000 in DI outlays.

¹⁴ A total of \$28,000 was outlaid in MIPPA-LIS.

¹⁵ Outlays are from the LAE account. Due to variations in timing in the reporting of outlays, these outlays will not match those included in the Budget Appendix. Outlay totals include outlays made from budget authority enacted in prior years.

Limitation on Administrative Expenses

AMOUNTS AVAILABLE FOR OBLIGATION/ANALYSIS OF CHANGES

Table 3.14—Amounts Available for Obligation^{1,2}
(Dollars in thousands)

	FY 2023 ³ Actual	FY 2024 ⁴ Estimate	FY 2025 ⁵ Estimate	FY 2024 to FY 2025 Change
Limitation on Administrative Expenses (LAE)				
Unobligated Balance and Transfers, start-of-year ⁶	\$373,961	\$375,854	\$306,376	-\$69,478
Unrealized Non-Attorney User Fees	-\$873	\$0	\$0	\$0
Unrealized SSI User Fees	\$0	\$0	\$0	\$0
LAE Appropriation	\$14,126,978	\$14,193,978	\$15,401,924	\$1,207,946
Subtotal LAE Resources	\$14,500,066	\$14,569,833	\$15,708,300	\$1,138,468
Total Obligations, LAE	\$14,110,772	\$14,463,456	\$15,602,224	\$1,138,768
Unobligated Balance, lapsing	\$105,501	\$0	\$0	\$0
Unobligated Balance, end-of-year (LAE Carryover)	\$283,793	\$106,376	\$106,076	-\$300
Medicare Savings Plan (MSP)				
Unobligated Balances, start-of-year	\$14,903	\$14,903	\$14,903	\$0
Obligations, MSP	\$0	\$0	\$0	\$0
Unobligated Balances, end-of-year	\$14,903	\$14,903	\$14,903	\$0
Medicare Improvements for Patients and Providers Act (MIPPA) - Low Income Subsidy (LIS)				
Unobligated Balances, start-of-year	\$11,313	\$11,285	\$11,285	\$0
Obligations, MIPPA – LIS	\$28	\$0	\$0	\$0
Unobligated Balances, end-of-year	\$11,285	\$11,285	\$11,285	\$0
State Children's Health Insurance Program (SCHIP)				
Unobligated Balances, start-of-year	\$1,920	\$1,898	\$1,898	\$0
Obligations, MIPPA – SCHIP	\$22	\$0	\$0	\$0
Unobligated Balances, end-of-year	\$1,898	\$1,898	\$1,898	\$0

¹ Totals may not add due to rounding.

² Table does not include reimbursables, and Technology Modernization Fund.

³ FY 2023 unobligated balances, end-of-year, include approximately \$106,000,000 of Program Integrity 18-month carry-out, \$16,000,000 of Dedicated Hearings FY 2023/2024 multi-year carry-out, and \$295,000,000 carryover/transferred from prior-year accounts.

⁴ FY 2024 unobligated balance, start-of-year, includes approximately \$106,000,000 of Program Integrity 18-month funds and \$270,000,000 transferred from prior-year accounts.

⁵ FY 2025 unobligated balance, start-of-year, includes approximately \$106,000,000 of Program Integrity 18-month carried into FY 2024 and \$200,000,000 transferred from prior-year accounts.

⁶ Includes multi-year carryover funds and recoveries for IT Systems, IT Modernization, Program Integrity, Dedicated Hearings, ARRA, and Altmeyer dedicated funding.

Limitation on Administrative Expenses

	FY 2023 ³ Actual	FY 2024 ⁴ Estimate	FY 2025 ⁵ Estimate	FY 2024 to FY 2025 Change
Medicare Access and CHIP Reauthorization Act (MACRA)				
Unobligated Balances, start-of-year	\$25,982	\$25,982	\$25,982	\$0
Obligations, MIPPA – MACRA	\$0	\$0	\$0	\$0
Unobligated Balances, end-of-year	\$25,982	\$25,982	\$25,982	\$0
Postal Service Reform Act of 2022 (PSRA)				
PSRA Appropriation	\$16,000	\$0	\$0	\$0
Unobligated Balances, start-of-year	\$0	\$14,891	\$8,505	-\$6,386
Obligations, PSRA	\$1,109	\$6,386	\$0	-\$6,386
Unobligated Balances, end-of-year	\$14,891	\$8,505	\$8,505	\$0
GRAND TOTAL, OBLIGATIONS	\$14,111,931	\$14,469,843	\$15,602,224	\$1,132,381

SUMMARY OF CHANGE IN ADMINISTRATIVE BUDGET AUTHORITY

Table 3.15—Summary of Change in Administrative Budget Authority from FY 2024 to FY 2025

	FY 2024	FY 2025	Change
MAJOR CATEGORIES – This section (not included in totals and subtotals below) attempts to crosswalk the major spending categories shown below (dollars in thousands).			
I. <u>Payroll Expenses</u>¹	\$8,037,940	\$8,735,426	\$697,486
Built-In Increase		\$481,805	\$481,805
Program Increase		\$215,681	\$215,681
II. <u>Non-Payroll Expenses</u>²	\$2,292,000	\$2,366,000	\$74,000
Built-In Increase		\$64,330	\$64,330
Program Increase		\$9,670	\$9,670
III. <u>Disability Determination Services</u>	\$2,630,938	\$2,809,000	\$178,062
Built-In Increase		\$102,875	\$102,875
Program Increase		\$75,187	\$75,187
IV. <u>Information Technology Systems</u>	\$1,214,000	\$1,471,898	\$257,898
Built-In Increase		\$0	\$0
Program Increase		\$207,898	\$207,898
Benefit System Modernization (no-year funding)		\$50,000	\$50,000
IV. <u>OIG Reimbursable Transfer</u>	\$19,100	\$19,600	\$500
Total, Budget Authority	\$14,193,978	\$15,401,924	\$1,207,946

¹ FY 2024 payroll includes \$55 million of OHO dedicated funding.

² Includes funding for Social Security Statements.

Limitation on Administrative Expenses

SUMMARY OF CHANGE IN ADMINISTRATIVE OBLIGATIONS FROM FY 2024 TO FY 2025

Table 3.16—Summary of Change in Administrative Obligations from FY 2024 to FY 2025
Summary of Changes

(Dollars in thousands)^{1,2}

	FY 2024	FY 2025		Change
	Obligations (thousands)	Federal WYs	Obligations (thousands)	Federal WYs Obligations (thousands)
BUILT-IN INCREASES – Built-in increases are year-over-year cost increases that are outside agency control, such as across-the-board Federal pay raises, changes in employee health benefit premiums, and the price of postage. These increases are not a result of changes in overall agency resources or agency program or policy changes. Most agency operational costs are captured in this category as payroll costs.				
A1. <u>Payroll Expenses</u>	\$8,054,462		\$8,504,745	\$450,283
Increases due to periodic step increases, health benefits, and career ladder promotions			\$157,014	\$157,014
Three-month effect of Federal pay increase effective January 2024 – 5.2%			\$107,645	\$107,645
Nine-month effect of Federal pay increase effective January 2025 – 2.0%			\$106,724	\$106,724
Additional Paid Day			\$28,900	\$28,900
Awards			\$50,000	\$50,000
A2. <u>Non-Payroll Costs</u> - Mandatory growth in non-payroll costs, including costs of security, guard services, postage, rent, lease renewals, etc.	\$1,508,836		\$1,569,882	\$61,046
A3. <u>State Disability Determination Services</u> - Mandatory growth in state DDS costs, including pay raises and the costs of obtaining medical evidence	\$2,630,938		\$2,733,813	\$102,875
A4. <u>Mailed Social Security Statements</u>	\$7,829		\$11,113	\$3,284

¹ Totals may not add due to rounding.

² Figures include Program Integrity

Limitation on Administrative Expenses

	FY 2024	FY 2025		Change	
	Obligations (thousands)	Federal WYs	Obligations (thousands)	Federal WYs	Obligations (thousands)
Subtotal, Built-In Increases	\$12,202,065		\$12,819,553		\$617,488
PROGRAM CHANGES – Program changes are year-over-year cost increases or decreases not captured in the section above. These result from changes in agency priorities, policy decisions, or dedicated funding.					
PROGRAM INCREASES					
B1. <u>Payroll Increase - Net Increase in SSA WYs</u>		1,713	\$215,981	1,713	\$215,981
B2. <u>Federal Intern Program (Net Increase)</u>		375	\$15,000	375	\$15,000
B3. <u>Net Increase in Disability Determination Services</u>			\$75,187		\$75,187
B4. <u>Non-Payroll Costs</u>	\$775,335		\$785,005		\$9,670
B5. <u>Information Technology (IT) – Base Funding</u> (excludes reimbursables)	\$1,214,000		\$1,421,898		\$207,898
B6. <u>Benefit System Modernization</u>			\$50,000		\$50,000
B7. <u>OIG Reimbursable Transfer for CDI Payroll (PI)</u>	\$19,100		\$19,600		\$500
Subtotal, Program Increases	\$2,008,435	2,088	\$2,582,671	2,088	\$574,236
Subtotal, Gross Increases	\$14,210,500	2,088	\$15,402,224	2,088	\$1,191,724
PROGRAM DECREASES					
D1. <u>IT Obligations Funded from Prior-Year Unobligated Balances</u>	\$250,000		\$200,000		- \$50,000
D2. <u>Altmever & Construction</u>	\$2,957		\$0		-\$2,957
D3. <u>Postal Service Reform Act</u>	\$6,386		\$0		-\$6,386
Subtotal, Program Decreases	\$259,343		\$200,000		-\$59,343
Subtotal, Gross Decreases	\$259,343		\$200,000		-\$59,343
Total Obligations, Net	\$14,469,843	2,088	\$15,602,224	2,088	+ \$1,132,381

Limitation on Administrative Expenses

BUDGETARY RESOURCES BY OBJECT

Table 3.17—Budgetary Resources by Object
(Dollars in thousands)^{1,2,3}

	FY 2024	FY 2025	Change
Personnel Compensation			
Permanent positions	\$5,526,438	\$5,929,674	\$403,236
Positions other than permanent	\$87,635	\$93,049	\$5,414
Other personnel compensation	\$195,272	\$295,758	\$100,486
Special personal service payments	\$2,000	\$2,000	-
Subtotal, personnel compensation	\$5,811,344	\$6,320,481	\$509,137
Personnel Benefits	\$2,265,603	\$2,431,845	\$166,242
Benefits for former personnel	\$3,000	\$3,000	-
Travel and transportation of persons	\$6,728	\$6,440	(\$288)
Transportation of things	\$6,950	\$6,654	(\$296)
Rent, communications, and utilities			
Rental payments to GSA	\$743,104	\$739,509	(\$3,595)
Rental payments to others	\$205	\$221	\$16
Communications, utilities, misc.	\$498,416	\$525,216	\$26,800
Printing and reproduction	\$25,291	\$24,210	(\$1,081)
Other contractual services (DDS, guards, etc.)	\$4,561,599	\$4,942,198	\$380,599
Supplies and materials	\$20,043	\$19,187	(\$856)
Equipment	\$393,464	\$454,723	\$61,259
Land and structures	\$40,361	\$38,811	(\$1,550)
Grants, subsidies, and contributions	\$39,122	\$37,450	(\$1,672)
Insurance claims and indemnities	\$54,613	\$52,279	(\$2,334)
Financial Transfers	-	-	-
Total Obligations	\$14,469,843	\$15,602,224	\$1,132,381
Resources not being obligated in the current year (carrying over or lapsing)	\$168,949	\$168,649	(\$300)
Total Budgetary Resources	\$14,638,792	\$15,770,873	\$1,132,081
Payments to State DDS (funded from other services and Communications, utilities, and misc.)	\$2,630,938	\$2,809,000	\$178,062

¹ Totals are shown in thousands, do not include reimbursables, and may not add due to rounding.

² The obligations include the base LAE appropriation, MIPPA, LIS, SCHIP, MACRA, Postage Reform, the Altmeyer Renovation, dedicated funding to address the hearings backlog, and for IT Modernization. Total budgetary resources in the table reflect FY 2024 and FY 2025 projections of spending by object class. Resources are not managed at the object class level and SSA has the flexibility within the LAE account to modify projected spending during the budget execution process.

³ These figures do not include Technology Modernization Fund funding.

Limitation on Administrative Expenses

ESTIMATED DISTRIBUTION OF AGENCY COSTS

The Estimated Distribution of Agency Costs exhibit displays SSA’s workyears and costs by major component group.

The President’s Budget funding level allows us to increase workyears by nearly 2,300 (about 2,100 SSA and 200 DDS) from FY 2024 to FY 2025. A full freeze in FY 2024 will bring our staffing to a new 25-year low, but with the FY 2025 President’s Budget funding level, we will rapidly restore staffing by targeted hiring in the Field Offices, the Teleservice Centers, Hearings Operations, and the DDSs. The President’s Budget funding level supports over 60,000 employees on-duty in SSA and over 13,000 in our DDSs, which will bring the Agency back above the end-of-year FY 2023 levels.

Table 3.18—FY 2023 - Estimated Distribution of Agency Costs¹
(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Workyears	Payroll	Benefits	Other Objects	Total
Field Offices	27,673	66	1,263	29,002	\$2,434,881	\$934,315	\$518,718	\$3,887,914
Teleservice Centers	4,078	8	58	4,144	\$263,486	\$101,522	\$22,304	\$387,313
Regional Offices ^{2,3}	1,221	5	21	1,247	\$154,635	\$55,111	\$324,166	\$533,911
Subtotal, RC Field	32,972	79	1,342	34,393	\$2,853,003	\$1,090,948	\$865,187	\$4,809,138
Program Service Centers and Office of Central Operations ³	9,348	24	1,028	10,400	\$809,487	\$307,646	\$114,204	\$1,231,337
Subtotal, Operations	42,320	103	2,370	44,793	\$3,662,490	\$1,398,595	\$979,391	\$6,040,476
Office of Hearings Operations	7,465	24	296	7,785	\$831,949	\$316,196	\$258,126	\$1,406,271
Office of Chief Information Officer	3,285	9	29	3,323	\$423,394	\$160,911	\$66,596	\$650,901
Office of Analytics, Review, and Oversight	1,869	4	56	1,929	\$226,748	\$86,176	\$8,237	\$321,160
Office of General Counsel	698	3	1	702	\$102,555	\$38,976	\$87,172	\$228,703
Headquarters ^{3,4}	2,848	7	30	2,885	\$361,174	\$137,239	\$933,281	\$1,431,694
Subtotal, SSA	58,485	150	2,782	61,417	\$5,608,309	\$2,138,093	\$2,332,803	\$10,079,205
ITS							\$1,556,767	\$1,556,767
DDS	13,166	0	388	13,554			\$2,474,800	\$2,474,800
Total LAE⁵	71,651	150	3,170	74,971	\$5,608,309	\$2,138,093	\$6,364,370	\$14,110,772

Limitation on Administrative Expenses

Table 3.19—FY 2024 - Estimated Distribution of Agency Costs¹
(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Work years	Salaries/ OT	Benefits	Other Objects	Total
Field Offices	26,865	92	763	27,720	\$2,486,190	\$989,277	\$549,232	\$4,024,699
Teleservice Centers	4,061	16	46	4,123	\$277,256	\$110,364	\$23,242	\$410,862
Regional Offices ²	1,048	8	15	1,071	\$143,791	\$52,355	\$337,711	\$533,857
Subtotal, RC Field	31,974	116	824	32,914	\$2,907,237	\$1,151,996	\$910,185	\$4,969,418
Program Service Centers and Office of Central Operations	9,221	44	574	9,839	\$818,525	\$313,795	\$142,225	\$1,274,545
Subtotal, Operations	41,195	160	1,398	42,753	\$3,725,762	\$1,465,791	\$1,052,410	\$6,243,963
Office of Hearings Operations	7,379	35	300	7,714	\$881,495	\$327,401	\$253,889	\$1,462,785
Office of Chief Information Officer	3,319	18	22	3,359	\$460,094	\$171,638	\$63,585	\$695,317
Office of Analytics, Review, and Oversight	1,835	10	62	1,907	\$237,540	\$90,910	\$8,279	\$336,729
Office of General Counsel	682	3	1	686	\$106,884	\$39,665	\$55,546	\$202,095
Headquarters ⁴	3,080	16	17	3,113	\$402,569	\$170,198	\$861,248	\$1,434,015
Subtotal, SSA	57,490	242	1,800	59,532	\$5,814,344	\$2,265,603	\$2,294,957	\$10,374,904
ITS				-			\$1,464,000	\$1,464,000
DDS	13,264	0	100	13,364			\$2,630,938	\$2,630,938
Total LAE	70,754	242	1,900	72,896	\$5,814,344	\$2,265,603	\$6,389,895	\$14,469,842
OIG Transfer ⁶				-			- \$19,100	-\$19,100
Total, LAE and OIG Transfer	70,754	242	1,900	72,896	\$5,814,344	\$2,265,603	\$6,370,795	\$14,450,742

Limitation on Administrative Expenses

Table 3.20—FY 2025 - Estimated Distribution of Agency Costs¹
(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Work years	Salaries/ OT	Benefits	Other Objects	Total
Field Offices	27,617	92	900	28,609	\$2,679,888	\$1,064,383	\$550,897	\$4,295,168
Teleservice Centers	4,602	16	82	4,700	\$333,798	\$132,745	\$23,688	\$490,231
Regional Offices ²	1,054	8	26	1,088	\$157,136	\$52,915	\$344,276	\$554,327
Subtotal, RC Field	33,273	116	1,008	34,397	\$3,170,822	\$1,250,043	\$918,861	\$5,339,726
Program Service Centers and Office of Central Operations	9,270	44	729	10,043	\$890,168	\$326,864	\$145,964	\$1,362,996
Subtotal, Operations	42,543	160	1,737	44,440	\$4,060,990	\$1,576,907	\$1,064,825	\$6,702,722
Office of Hearings Operations	7,557	35	300	7,892	\$946,212	\$351,689	\$271,359	\$1,569,260
Office of Chief Information Officer	3,338	18	30	3,386	\$494,247	\$178,559	\$76,152	\$748,958
Office of Analytics, Review, and Oversight	1,888	10	62	1,960	\$259,521	\$96,823	\$8,556	\$364,900
Office of General Counsel	709	3	1	713	\$117,083	\$43,455	\$48,805	\$209,343
Headquarters ⁴	3,176	16	37	3,229	\$445,428	\$184,412	\$896,303	\$1,526,143
Subtotal, SSA	59,211	242	2,167	61,620	\$6,323,481	\$2,431,845	\$2,366,000	\$11,121,326
ITS							\$1,671,898	\$1,671,898
DDS	13,155	0	400	13,555			\$2,809,000	\$2,809,000
Total LAE	72,366	242	2,567	75,175	\$6,323,481	\$2,431,845	\$6,846,898	\$15,602,224
OIG Transfer							-\$19,600	-\$19,600
Total, LAE and OIG Transfer	72,366	242	2,567	75,175	\$6,323,481	\$2,431,845	\$6,827,298	\$15,582,624

¹ Includes Reimbursable workyear (192 workyears in FY 2023, 225 FTEs in FY 2024, and 250 FTEs in FY 2025). FY 2023 includes NSC, dedicated funding for OHO, IT Modernization, Postage Reform and Altmeyer. FY 2024 includes dedicated funding for OHO, Construction, Postage Reform, and Altmeyer.

² Includes Field Office Guard Services in the Other Objects lines.

³ Effective April 2023, we realigned the HR specialists from the Regions, Office of Hearings Operations, and Office of Central Operations (OCO) to our Office of Human Resources. As a result, approximately 400 FTPs (~300 from Regional Offices, and ~50 from OCO) transferred from Operations to Headquarters and 50 from OHO to Headquarters.

⁴ Includes multiple items which cover expenditures for the entire agency. Examples include: Return to Work Incentives, Department of Interior Payroll IAA for the Agency, GSA Delegations, Data Exchanges, Sustainability and Reinvestigations, Facilities and Maintenance, Employee Health Services, and Headquarters Guard Services.

⁵ 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.

⁶ 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. The Budget also assumes a \$19.1 million transfer from the LAE account to the OIG for costs associated with jointly operated CDI unit costs in FY 2024, the same level as in the FY 2024 President's Budget. See the Program Integrity exhibit in the LAE section for more information.

Limitation on Administrative Expenses

WORKLOAD PROCESSING AND COST DISTRIBUTION ACROSS THE ORGANIZATION

To provide additional transparency into how we spend resources, we are providing an example of how we process disability claims, one of our key workloads. This example demonstrates the movement of claims through multiple organizational components which handle various tasks required to complete the claim. Each claim usually incurs costs in multiple components, which are supported by our agency-wide costs (e.g., overhead costs such as rent, guard services, information technology systems). These agency level costs are applied after we assign direct component-level costs to a particular workload using generally accepted cost accounting principles of allocation.

This example follows a disability claim¹ filed in a field office. However, applicants can also file a claim online and the remainder of the process is the same as in this example. Our field office staff ensures proper documentation and evaluates non-medical eligibility factors. The claim then goes to the State disability determination services (DDS) for a medical determination. If the DDS issues a favorable determination, the claim then goes back to the field office for processing. In some cases where there are complex issues, such as payment offsets due to workers' compensation or other benefits, or systems limitations that require manual processing, the processing center (PC) will effectuate the claim. Among other types of quality reviews, our Office of Quality Review may also conduct a pre-effectuation review (PER) of the DDS determination. We conduct these PERs to meet statutory requirements of the Act, which requires SSA to review at least 50 percent of favorable initial and reconsideration determinations on a pre-effectuation basis.

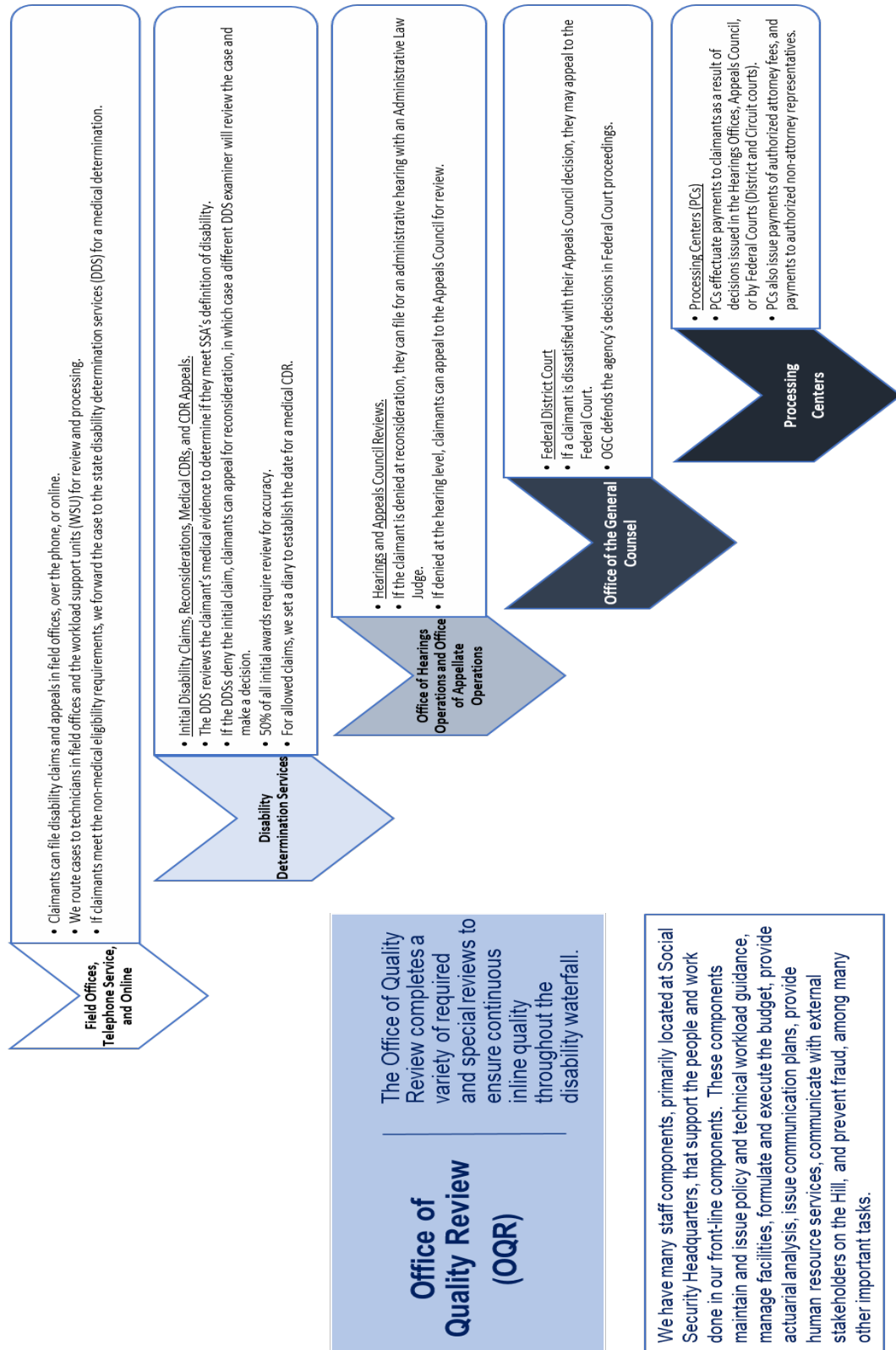
If the DDS issues an unfavorable determination, the applicant typically has 60 days to file for a reconsideration of their claim. During a reconsideration, a different DDS disability examiner (DE) than the DE who made the initial medical determination conducts a thorough reexamination of all evidence on the record. If the DDS denies the reconsideration, the applicant may file a request for a hearing by an administrative law judge (ALJ). The applicant or representative can file the hearing request online, by fax, mail, or in a field office. The case is then sent to a hearing office to schedule and hold the hearing by an ALJ, either virtually, by telephone, or in-person. If the ALJ issues a favorable decision, the claim will then go to the PC to calculate offsets, pay attorney fees, and initiate benefit payments. If the ALJ denies the claim, the applicant can file an appeal online, by fax, mail, or in a field office to the Appeals Council for a review and decision. Finally, if the Appeals Council denies the claim, the applicant may appeal to the Federal Courts.

When allocating operating costs to agency level workloads, we assign the costs for these completed direct work activities to the workload that they support. Agencywide costs such as human resources, information technology, and policy guidance indirectly support the work we do, so we also apply a portion of these costs to each workload proportionally, based on the direct costs of doing the work.

The chart on the next page provides an organizational view of our disability waterfall to further illustrate this example of how work moves across components.

¹ Note that for certain applicants, SSA field offices will initiate the application for the Supplemental Nutrition Assistance Program (SNAP), as well as process applications for Medicaid or Medicare.

An Organizational View of Our Disability Work Process



Limitation on Administrative Expenses

PERFORMANCE TARGETS

The President's FY 2025 request will allow us to achieve the following key performance targets:

Table 3.21—Key Performance Targets

Workload and Outcome Measures	FY 2023 Actual	FY 2024 Estimate	FY 2025 President's Budget
Retirement and Survivor Claims (includes Medicare)			
Retirement and Survivor Claims Completed (thousands)	6,693	6,654	6,735
Disability Claims			
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
Disability Reconsiderations			
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)	213	225	215
Hearings			
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) ¹	450	345	270
National 800 Number			
National 800 Number Calls Handled (millions) ²	30	31	32
Average Speed of Answer (ASA) (minutes) ³	36	32	12
Agent Busy Rate (percent)	8%	2%	1%
Program Integrity			
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
Selected Other Agency Workload Measures			
Social Security Numbers (SSN) Completed (millions)	18	19	19
Annual Earnings Items Completed (millions)	304	312	313
Social Security Statements Issued (millions) ³	15	11	15
Selected Production Workload Measures			
Disability Determination Services Production per Workyear ⁴	240	249	262
Office of Hearings Operations Production per Workyear	69	81	81
Additional Operations Workyears Needed to Process Incoming Work (Workyear Shortfall) ⁵	N/A	(2,500)	(2,500)

Limitation on Administrative Expenses

Our budget is fully integrated with our Annual Performance Plan and Report (APR), which is included as the last tab in this *Justification of Estimates for Appropriations Committees*, and online at [our website](#). The budget estimates are linked to the key performance measures above and support all of the more detailed measures outlined in the APR.

¹ 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.

² 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.

³ 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.

³ 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.

⁴ 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.

⁵ We do not have a budgeted workload measure for “Additional Operations Workyears Needed to Process Incoming Work (Workyear Shortfall)” in the actual year.

Limitation on Administrative Expenses

PROGRAM INTEGRITY

The FY 2025 President's Budget demonstrates how we balance stewardship and frontline service. We take our responsibilities seriously to ensure eligible individuals receive the benefits to which they are entitled, and to safeguard the integrity of benefit programs to better serve recipients and beneficiaries.

We utilize dedicated program integrity (PI) funding to promote responsible spending of Social Security funds and ensure that we are providing the correct benefit amounts only to those who qualify. We conduct continuing disability reviews (CDRs) to ensure that beneficiaries who still qualify to receive benefits under the OASDI and SSI programs continue to receive them. For those receiving SSI, we also perform non-medical redeterminations (RZs) to determine whether recipients continue to meet the program's income and resource limits. PI funding also supports Cooperative Disability Investigation (CDI) units and the prosecution of fraud by Special Assistant United States Attorneys (SAUSAs).

The President's Budget assumes the [Fiscal Responsibility Act \(FRA\) of 2023 \(P.L. 118-5\)](#) levels for the program integrity cap adjustments in FYs 2024 and 2025. The FY 2025 President's Budget includes \$1.903 billion in dedicated funding for PI activities, including a \$1.630 billion cap adjustment, \$119 million above the FY 2023 enacted level. The Budget also assumes \$1.851 billion in dedicated funding for PI activities in FY 2024, including a \$1.578 billion cap adjustment.

From the cap adjustment funding, we make an annual transfer to the OIG for costs associated with jointly-operated CDI Unit costs. For 2024, please note that the President's Budget Appendix assumes the CR level for this transfer (\$15.1 million), whereas the congressional justification assumes the 2024 Budget level (\$19.1 million) to better reflect estimated costs within the FRA-level cap adjustment.

Dedicated PI funds are a subset of our total LAE funding and are available for 18 months from the start of the fiscal year in which it is appropriated. The President's Budget continues to assume 18-month availability for PI funding and, consistent with prior years, restricts us from using any non-PI LAE funding on PI activities.

Our FY 2025 discretionary request assumes continued funding of these activities for each year of the 10-year budget window.

Access to the discretionary funding requested in FY 2025, as well as fully-funded base and adjustment amounts in FY 2026 through FY 2034, would produce \$82 billion in gross Federal savings (\$60 billion from adjustments), with additional savings beyond the 10-year window. Net savings resulting from approximately \$19 billion in adjustments alone would produce approximately \$41 billion over 10 years, with additional savings after the 10-year period.

CDRs conducted in FY 2025 will yield an estimated return on investment (ROI) of about \$9 on average in net Federal program savings over 10 years per \$1 budgeted for dedicated program integrity funding, including OASDI, SSI, Medicare, and Medicaid program effects. Similarly,

Limitation on Administrative Expenses

the ROI for non-medical redeterminations conducted in FY 2025 will be about \$3 on average of net Federal program savings over 10 years per \$1 budgeted for dedicated PI funding, including SSI and Medicaid program effects. Table 3.22a provides additional information. Regaining currency in our medical CDR workload is important, although our most immediate focus in FY 2025 is to timely serve the public who have claims pending with us. We achieved full medical CDR currency in FY 2018; however, due to the COVID-19 pandemic we were unable to remain current beginning in FY 2020. The funding included in the FY 2025 President’s Budget will enable us to regain currency on CDRs in FY 2026 and remain current throughout the Budget window.

In FY 2023, we completed 550,197 full medical CDRs and 2,515,721 RZs. We plan to complete 575,000 full medical CDRs in both FY 2024 and FY 2025, making progress toward CDR currency. We also plan to complete 2.489 million RZs in FY 2024 and 2.482 million RZs in FY 2025.

Please refer to the Budget Process chapter in the *Analytical Perspectives* for more details on the Budget’s approach to adjustments and our activities.

Table 3.22a—Program Integrity Workloads and Funding by Source – 10-Year
(Dollars in millions)

	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	10-year Total
Discretionary BA (non-add)	1,630	1,749	1,777	1,747	1,851	1,930	1,956	1,993	2,052	2,104	18,789
Discretionary Outlay Costs ¹	1,630	1,746	1,776	1,748	1,848	1,928	1,955	1,992	2,051	2,102	18,776
Mandatory Savings ²	-15	-2,216	-3,678	-5,023	-5,450	-6,734	-7,711	-8,635	-9,964	-10,375	-59,801
Net Effect	1,615	-470	-1,902	-3,275	-3,602	-4,806	-5,756	-6,643	-7,913	-8,273	-41,025

¹ The discretionary costs are equal to the outlays associated with the budget authority levels proposed for adjustments. The costs for 2025 through 2034 reflect the costs to complete the anticipated dedicated program integrity workloads for SSA.

² The mandatory savings from adjustment funding are included in the policy projections for Social Security, Medicare, and Medicaid. SSA’s Office of the Chief Actuary and the Centers for Medicare and Medicaid Services’ Office of the Actuary estimates the savings.

Limitation on Administrative Expenses

Table 3.22b—Program Integrity Workloads and Funding by Source¹
(Dollars in millions)

	FY 2023 Actuals	FY 2024 Estimate	FY 2025 Estimate
Volumes			
Full Medical CDRs Completed	550,197	575,000	575,000
SSI Non-Medical RZs Completed	2,515,721	2,489,000	2,482,000
Funding^{2,3}			
Unobligated Balance, start-of-year	\$101	\$106	\$106
Dedicated Program Integrity Funding	\$1,784	\$1,851	\$1,903
Subtotal PI Resources	\$1,885	\$1,957	\$2,009
Less Unobligated Balance, end-of-year	-\$106	-\$106	-\$106
Total PI Obligations⁴	\$1,778	\$1,851	\$1,903
Old Age and Survivors Insurance (OASI)	\$149	-	-
Disability Insurance (DI)	\$212	\$348	\$344
Supplemental Security Income (SSI)	\$1,235	\$1,503	\$1,559
Medicare Part A, Hospital Insurance (HI)	\$76	-	-
Medicare Part B, Supplementary Medical Insurance (SMI)	\$93	-	-
Medicare Part D, Drug Coverage	\$13	-	-
Total PI Obligations⁵	\$1,778	\$1,851	\$1,903

¹ Totals may not add due to rounding.

² Dedicated program integrity funds have 18-month availability. The Budget assumes funding to complete planned program integrity workloads in FY 2025, including through base funding and a cap adjustment.

³ Includes annual transfers from LAE to the SSA's Inspector General (OIG) for the cost of jointly operated anti-fraud CDI units, including a \$15,100,000 transfer in FY 2023, a \$19,100,000 transfer in FY 2024, and a \$19,600,000 transfer in FY 2025.

⁴ Totals include the combined costs of CDRs, SSI RZs, CDI units, and the SAUSAs.

⁵ We project workload costs for DI and SSI spending but not for OASI, HI, SMI, or Medicare Part D. We report these costs with the actuals.

Budgeting and Managing Program Integrity Workloads

While we take many steps to ensure we analyze and budget for the costs of our CDR and SSI RZ workloads, we do not know actual costs until after the end of the fiscal year. The 18-month authority allows us the flexibility to obligate our dedicated program integrity funding responsibly. The individual unit costs and the volume of work processed for CDRs and RZs are the primary drivers that determine the actual total program integrity costs. Fluctuations in our PI unit costs occur throughout the year due to a variety of factors, such as:

- hiring and training, which can impact productivity in the work units where PI work is done;
- information technology investments (e.g. timing of development and acquisitions);
- policy changes;
- business process changes;
- timing of work completion (e.g. work can start in a prior fiscal year and clear in the next); and,
- the types of cases processed in a year (e.g. processing a greater number of more time-consuming types of CDRs in a year can increase unit costs in that year).

In addition to these items that add costs to the PI workloads, it can be difficult for the agency to closely control the volume of PI work that is completed. PI work occurs across the country in every field office, processing center, and State DDS. Some PI work must be done on-demand when we become aware of an issue with a claimant's situation and cannot be planned. Therefore, it is difficult to predict exact workload processing targets in advance.

We track PI spending and analyze and review cyclical trends in PI costs throughout the fiscal year. However, it takes time to calculate and analyze the actual cost of completing PI work, which challenges our ability to forecast spending and reconcile costs timely. Therefore, we must make a conservative estimate of total expected costs at the end of the year to stay within the total available program integrity funding.

We calculate the unit costs for PI workloads using data from our Cost Analysis System. This system allocates our administrative costs to all of our workloads, including CDRs and RZs. Changes in other agency workloads, as well as in other large agency cost categories such as information technology (IT), can impact the overall total unit costs for PI workloads, which can make it difficult to predict end-of-year costs for CDRs and RZs throughout the year.

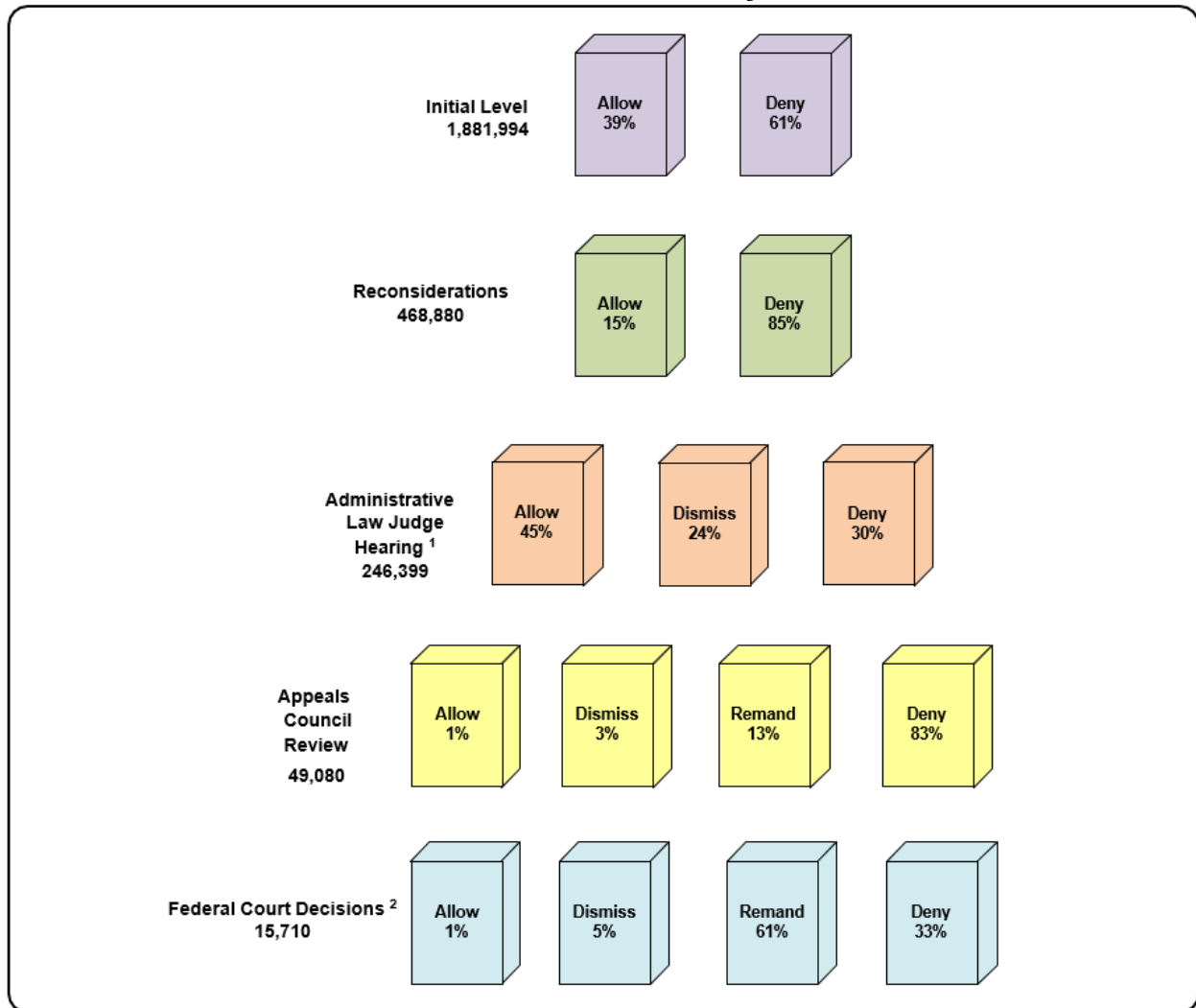
Our PI unit costs can be broken down by direct payroll, direct other objects, information technology systems (ITS), and agency shared costs that include both payroll and other objects. Our direct payroll includes costs of our employees in the front-line workload processing components like our field offices, program service centers, and State DDSs. Other objects costs can be broken down to just direct other objects costs of our front-line workload processing components. ITS costs include all non-payroll costs associated with our IT investments. Lastly, agency shared costs include all other component costs, like headquarters components as well as a portion of rent, postage, and guards.

Limitation on Administrative Expenses

While we strive to hit all performance targets, we closely monitor and adjust our workload processing plans for PI workloads based on our real experience. We also continue to consider the effects of the cost factors described above in our ongoing analysis to pace this workload and to inform our spending decisions.

FISCAL YEAR 2023 DISABILITY DECISION DATA

Table 3.23—Fiscal Year 2023 Disability Decision Data*



* Workload volumes for initial claims, reconsiderations, and hearings do not align with performance reported in our key performance table because the data definition captures broader activity.

¹ From March 2020 through June 2022, SSA deferred cases for claimants unresponsive to contact attempts until reentry from pandemic posture, resulting in dismissals comprising a smaller percentage of total dispositions for FY 2020-2022. The percentage of cases dismissed increased in FY 2023 primarily due to the adjudication of claims where contact could not be established.

² Only Federal Court data includes appeals of Continuing Disability Reviews (CDRs).

Data Sources:

1. Initial and Reconsideration Data: SSA State Agency Operations Report
2. Administrative Law Judge and Appeals Council Review data: SSA Office of Hearing Operations (OHO) and SSA Office of Analytics, Review, and Oversight (OARO)
3. Federal Court data: SSA Office of General Counsel (OGC)

Includes Title II, Title XVI, and concurrent initial disability determinations and appeals decisions issued in FY 2023, regardless of the year in which the initial claim was filed, and regardless of whether the claimant ever received benefits (in a small number of cases with a favorable disability decision, benefits are subsequently denied

Limitation on Administrative Expenses

because the claimant does not meet other eligibility requirements). Does not include claims where an eligibility determination was reached without a determination of disability. If a determination or appeals decision was made on Title II and Title XVI claims for the same person, the results are treated as one concurrent decision.

NOTE: Due to rounding, data may not always total 100%.

Prepared by: SSA, Office of Decision Support and Strategic Information (ODSSI)

Date Prepared: January 29, 2024

PRIORITY GOALS

To ensure our accountability to the public we serve, and as required by the GPRA Modernization Act of 2010, our Agency Priority Goals (APG) help us achieve our overarching strategic goals and objectives set forth in our FYs 2022–2026 Agency Strategic Plan.

Our FYs 2024–2025 APGs are:

1. **Improve Initial Disability Claims.** Improve the customer experience by reducing the wait time for an initial disability claim decision.
 - By September 30, 2025, achieve an average processing time for initial disability claims of 215 days.¹
 - By September 30, 2025, decide 92 percent of pending initial disability claims that begin the fiscal year 180 days old or older.
2. **Improve the National 800 Number Service.** Improve the customer experience by reducing the wait time² to answer the phone on the National 800 Number.
 - By September 30, 2025, achieve an average speed of answer of 12 minutes,³ including implementation of estimated wait time and call back options.¹
3. **Improve Equity in the Supplemental Security Income Program.** Improve equity in the SSI program by increasing underpayment processing of our oldest and highest priority cases, including those disproportionately impacted by poverty.
 - By September 30, 2025, complete 98 percent of SSI underpayments that have been identified as priority cases or pending for a year or more at the beginning of fiscal year 2024.

We have specific performance indicators and milestones to monitor our progress, and our goals reflect our Enterprise Risk Management actions. Additionally, through our quarterly internal review process, our executives have candid discussions regarding progress, any challenges we must overcome, and strategies supporting APG goal achievement. These priority goals remain an agency focus, and we are working to address performance challenges that may impact our ability to meet our targets.

Please see the FYs 2023–2025 Annual Performance Report and www.performance.gov for more information on our APGs.

¹ This target is also a budgeted workload measure.

² Wait time is measured by the average speed of answer (ASA), which is measured from the time the call enters the queue until the call is answered by an agent. It does not include time spent in self-service.

³ SSA will continue to evaluate this aspirational goal as the agency gains experience with a new phone system and monitors the impact of a current FY 2024 hiring freeze on the number of phone agents.

CUSTOMER EXPERIENCE

The Social Security Administration (SSA) administers Federal financial safety net programs that serve more than 72 million people. As a high impact service provider, we interact with our customers at multiple points in their lives: from birth, to entering the workforce, to facing a disability or loss of a family member, to enrolling in Medicare, and when reaching retirement age. We are committed to improving the customer experience (CX) by:

- Ensuring accountability for CX activities and programs;
- Maintaining our integrated, real-time customer feedback program;
- Conducting human-centered design research, involving our customers in the design and improvement of program delivery;
- Making services accessible; and
- Fulfilling our commitment to Executive Order (EO) [14058](#)

The fiscal year (FY) 2025 budget request supports our planned activities, as noted below, to make focused improvements to the designated priority services we identified in our FY 2023 action plan. Those services are: obtaining adult disability benefits, applying for a replacement Social Security number card, and filing for Social Security retirement benefits. It also supports our efforts to integrate CX practices throughout the agency and our role in the cross-agency life experience projects led by the Office of Management and Budget (OMB).

CX Focused Improvements

In accordance with EO 14058, *Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government*, we are designing and delivering services that focus on the experiences of the people we serve through our three designated priority services:

- Improving ssa.gov to provide a more customer-centric, convenient, user-friendly, and secure self-service online application environment for our retirement applicants. Since its launch in December 2022, there have been regular updates to improve the appearance and functionality of ssa.gov for all SSA customers. One of the five major areas of focus for content redesign has been the retirement section. Recent data from research with retirement applicants revealed a statistically significant increase in the number of online retirement claims filed, from 46 percent in FY 2020 to 63 percent in FY 2022. To support continued increases in online filings and to improve the customer experience, we want to make it easier and more efficient for our customers to apply for retirement benefits online. To that end, we plan to launch redesigned content for both the survivor and auxiliary benefits sections of ssa.gov and make additional revisions to the previously redesigned retirement content section. These changes include updating and expanding the retirement eligibility screener. The changes also include improvements to the appearance and functionality of the website, making site navigation easier, and improving content to help users understand retirement types and determine eligibility.

Limitation on Administrative Expenses

- Informing agency-wide CX improvement strategies based on identified pain points with obtaining adult disability benefits. From January 2023 to October 2023, an SSA workgroup, the Disability Journey Transformation Team, explored our adult disability application process. Using human-centered design, the team obtained extensive data from customer interviews and surveys, employee interviews and focus groups, and review of agency data sources. The team used the information to develop journey maps, identify key pain points encountered by our customers, and inform cross-component efforts within SSA to improve the CX experience. For example, the team's research identified that applicants were unprepared for the level of detail needed for an initial claim interview. To address this issue, we are working collaboratively to implement processes beginning in FY 2024 and throughout FY 2025 for collecting alternative contact information for our customers; sending consistent and standardized text message and email appointment reminders; improving the content and design of the adult disability starter kit; and developing short, customer-tested video lessons to help navigate the application process.
- Improving the capabilities of the Enterprise Scheduling System (ESS). ESS is an interactive online scheduling application for enumeration appointments for both original and replacement Social Security cards and for customers without a Social Security number. ESS is currently available in all 50 States, as well as Puerto Rico and the U.S. Virgin Islands. By FY 2025, we plan to add a video option for enumeration appointments so that customers who need to meet with a representative can do so without going into an office or card center.

In addition to focusing on improvements within our three designated priority services, we continue to work in support of our commitments on EO 14058 through actions such as:

- eSignature and Upload Documents (formerly eSubmit) - The Office of Transformation's (OT) eSignature and Upload Documents initiative provides a technician-initiated method for customers to electronically submit certain forms and evidence to SSA that *do not* require a signature, certification, or to be an original document. It also allows customers to electronically sign certain forms that *do* require signatures. In total, there are currently 48 first-party forms and 52 evidence types that can be completed using our mobile-friendly service, electronically signed if necessary, and submitted using Upload Documents. The goals for this initiative include national rollout of this service in all offices by March 2024. In FY 2025, we will increase the number of available forms on a continuous, rolling basis and expand upload documents to support mobile-friendly web forms, integrate with *my Social Security*, and support customer-initiated submissions and third-party forms.
- Signature Removal-Under OT's eSignature/Upload Documents initiative - In FYs 2024 and 2025, we will continue to evaluate SSA forms in batches of 10 to determine which

Limitation on Administrative Expenses

forms, if any, can allow for elimination of a physical signature. Thus far, SSA has determined that 65 percent of forms reviewed (13 of 20) can allow for signature removal.

Building Internal Capacity

While not in direct support of EO commitments, our agency is engaged in several related initiatives that seek to improve the CX by making it easier for customers to receive our services. We plan to build internal capacity in FYs 2024 and 2025 to offer more support to these agency-wide efforts, while continuing to focus on our priority designated services and other EO commitments. Through the addition of programmatic support in the areas identified in our FY 2024 CX Capacity Assessment, our Customer Experience Office (CXO) will expand its support of the Enterprise Contact Center (ECC) and Supplemental Security Income (SSI) Simplification.

- ECC - The ECC initiative enables SSA to manage multichannel customer interactions holistically by increasing customer and employee satisfaction across all digital communications channels: phone, web, video, text, and chat.
- SSI Simplification - This initiative intends to improve the application process for those applying for SSI. This effort includes streamlining the application process to ask fewer and easier-to-understand questions. Efforts are also underway to improve the design of the online application to give customers more immediate feedback on their potential eligibility for SSI benefits.

Establishing and Sustaining CX Accountability

The budget supports integrating CX practices across our organization. We invested in developing a sustainable CXO with the right expertise to support our CX management disciplines as identified in the bulleted points below. This office is focused on gaining a deep understanding of our customers' experiences with our current services, as well as further integrating human-centered design as we develop and implement service improvements.

Our CXO coordinates agency-wide CX management practices and standards, and it guides, educates, and helps us consistently prioritize the customer experience. Our CXO is part of the newly established OT, which reports directly to the Commissioner and works side by

CX Management Disciplines:

- Customer research and understanding,
- CX measurement,
- Customer journey mapping,
- Human-centered design, and
- Customer-centric culture.

side with Deputy Commissioners across the agency. Including CX within OT embeds customer-centered principles into the most critical enterprise business and technology enhancements we are developing to serve the public and support our frontline employees. Moving forward, we

Limitation on Administrative Expenses

plan to leverage the research findings from the Disability Journey Transformation Team’s work to develop SSA’s future state, a collection of solution concepts that can successfully address customer challenges. We will share this information agency-wide to engage various components in this effort and empower them as agents of CX improvement. We have already begun this effort by leveraging research to identify design principles for improving written communication with our customers.

Contributing to Life Experience Efforts

We are partners in OMB’s life experience projects, which are intended to streamline Federal Government service delivery at some of the most critical moments in people’s lives. We have been engaged in the *Approaching retirement* and *Facing a financial shock* life experiences. We plan to continue our involvement (to the degree that we are able within the context of our budget and agency priorities) by supporting two projects as part of the *Approaching retirement* life experience. The first project involves linking benefit programs for fixed-income individuals through enabling real time customer data sharing for low-income customers of both SSA and the Department of Housing and Urban Development. This effort reflects SSA’s EO commitment to integrate SSA data and processes with those of other Federal and State entities whenever possible. The second project pertains to efforts related to the *Streamlining Medicare only Enrollment* project, which is reflected in the HHS Budget. For additional information about specific projects relating to this effort, see [performance.gov/cx/projects/](https://www.performance.gov/cx/projects/).

For more information about our CX efforts, please see our [FYs 2022–2026 Agency Strategic Plan](#), [FYs 2023–2025 Annual Performance Plan and Report](#), and [performance.gov](https://www.performance.gov).

ADVANCING EQUITY, INCLUDING DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY (DEIA) IN THE WORKFORCE, AND CONDUCTING OUTREACH TO PEOPLE POTENTIALLY FACING BARRIERS

We are committed to ensuring equity and accessibility by improving our customer experience and addressing administrative barriers to participation in our programs. We have developed and implemented targeted strategies to enable our customers to better access our programs and services by eliminating barriers to participation in our programs, reaching out to people who may be underserved, and improving service delivery.

This exhibit provides a summary of our accomplishments and ongoing efforts to advance equity, including DEIA in the workforce, in support of the [President’s Management Agenda](#) and Executive Orders (EO) [13985](#), [13988](#), [14031](#), [14035](#), [14041](#), [14091](#), and [13175](#); and highlights some of our outreach efforts to people who may be facing barriers to accessing our programs and services.

EO [13985](#), *Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*, and EO [14091](#), *Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*

Limitation on Administrative Expenses

In accordance with EOs [13985](#) and [14091](#), we are coordinating a multi-year, agency-wide, and interagency effort to ensure equitable access to our programs and services by removing unnecessary administrative burdens, ensuring access to quality services and program benefits regardless of an individual's ability to communicate in English, and increasing data collection to extend outreach and better serve people seeking our programs and services. Our efforts are focused on using a multi-faceted approach to simplify the Supplemental Security Income (SSI) application and processes; improve language access to better serve limited English proficiency (LEP) communities; address our timely processing of SSI underpayments and assess root causes for improper payments; increase awareness of survivors benefits to children and families, same-sex couples, and people disproportionately impacted by COVID-19; and increase opportunities for the voluntary collection of race and ethnicity data. Additionally, we commit to increase outreach and develop relationships with a diverse group of advocates, community organizations, and people with lived experience in navigating our programs, and underserved communities; to help us identify and address administrative barriers in accessing our services; and improve service delivery.

In support of EO [13985](#) and our commitment to equity, below are several examples of our FY 2023 accomplishments:

- Sent a total of 3.5 million outreach mailers in FYs 2021, 2022, and 2023 to Social Security beneficiaries who may also be eligible for SSI. The mailer, released in English and Spanish, provided the national toll-free number to assist recipients in determining eligibility for SSI.
- Provided [online resources](#) and conducted training for organizations and individuals who assist others in applying for SSI, providing more trusted resources within communities to help people access services since FY 2021.
- Launched an online [SSI Protective Filing \(eSPF\) tool](#) in March 2022, that allows individuals, or someone assisting them, to schedule an appointment to apply for SSI, which sets the protective filing date and helps determine the date of entitlement for benefits. As of January 26, 2024, there have been over 1,069,000 transactions using eSPF, of which over 170,000 were third-party requests, resulting in over 435,000 SSI applications.
- Participated in the Hispanic National Bar Association 2023 Annual Convention, in support of the White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Hispanics. We provided information about careers, collected resumes, and shared resumes with SSA hiring managers.
- Announced the Interventional Cooperative Agreement Plan (ICAP) on [the agency's grant announcements page](#). ICAP awards up to \$3 million to grantees to perform research in various areas, particularly in the sciences. We offered two informational ICAP sessions on June 23, 2023 and June 28, 2023.

Limitation on Administrative Expenses

- Announced the Analyzing Relationships between Disability, Rehabilitation, and Work Small Grant Program, which offers approximately \$450,000 worth of stipends to graduate students across the country. The program is administered through a grant management organization, which is tasked with distributing up to 25 stipends per year. We expect to award the new grant management organization in September 2024.
- Updated policies to ensure more equitable disability determinations. For example, we ended the use of a race-based estimated glomerular filtration rate to measure kidney impairment, which was leading to the misdiagnosis of kidney impairment as less severe for many Black or African Americans. This change in policy conforms with scientific advancements and recommendations from the medical community and kidney patients.
- Compiled and published research and statistics detailing the demographic makeup of SSA program populations in FY 2023. In addition, our Racial Equity Research, Statistics, and Data Resources [webpage](#) is now available to the public.
- Established the Office of Native American Partnerships to build relationships with Tribal communities and strengthen our commitment to reducing barriers.
- Published 13 blogs to raise awareness with underserved communities on SSA's programs and policies.
- Published and released 12 Dear Colleague Letters on topics to promote and raise awareness of SSA's programs and services to underserved communities. SSA's Dear Colleague Letters are distributed to more than 12,000 contacts.
- Created four new webpages on [SSA.gov](#) and a YouTube video to raise awareness about SSA programs and services for people who are in underserved communities and for people who work with hard-to-reach audiences.
 - [Social Security in Rural Communities | SSA](#)
 - [Advocates | Communications Corner | SSA](#)
 - [Information for People Helping Others | SSA](#)
 - [Outreach Materials for People Facing Barriers | SSA](#)
 - [Multi-Language | YouTube](#)
- Sponsored a series of outreach events with internal and external groups, working with over 1.2 million individuals in the Denver and Seattle Regions, which service some of the country's most geographically remote areas. Notable initiatives include in-person services in three remote locations in Alaska and activities specifically focused on serving American Indian and Alaska Native communities.
- Made Form SS-5 (Application for a Social Security Card) instructions available in 15 languages other than English and Spanish in local Social Security offices and Card

Limitation on Administrative Expenses

Centers. The non-English instructions will help applicants with LEP complete the English-language form SS-5.

We implemented EO [14041](#) in a variety of ways, including the following examples:

- Encouraged participation in SSA research grants by Historically Black Colleges and Universities (HBCUs) and Institutions Serving Students of Color (ISSCs). The Retirement and Disability Research Consortium (RDRC) shared information on grant funding opportunities with over 35 HBCUs. RDRC will implement training programs for targeted outreach to HBCUs and ISSCs to ensure all grantees have the tools to collaborate across institutions and disciplines.
- Participated in the 2023 National HBCU Week Conference in support of the White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity through HBCUs. We provided information about careers, internships, research and funding opportunities, and cooperative agreement opportunities.
- Increased HBCU outreach and engagements to 56 of 103 HBCUs in FY 2023.

To further advance equity, in FYs 2024 and 2025, we will:

- Improve access to the SSI program for women, families, individuals from underserved communities, and other people potentially facing barriers. To meet our customers' needs and advance equity, we are streamlining several regulations, simplifying the application process, and releasing digital tools for electronic form submission to improve an applicant's ability to complete the application process and receive the full benefits for which they are entitled.
- Improve equity in access to our programs for our customers who communicate primarily in languages other than English. We will increase the availability of translated materials and the number of languages in which those materials are offered, improving access to language interpretation services, and increasing culturally attuned outreach to Native American and Alaska Native, LEP, and migrant communities.
- Reduce pending SSI underpayments to improve equity in the delivery of payments to our customers disproportionately affected by poverty. To improve equity in the delivery of payments to our 7.5 million customers, we will assess the root causes of improper payments, improve payment accuracy, and focus on reducing SSI underpayments as part of our SSI Equity Agency Priority Goal.
- Increase awareness of Survivors Benefit eligibility for children, families, same-sex couples, and people disproportionately impacted by COVID-19. Increased awareness of benefit and eligibility requirements for survivors benefits may increase economic security for children, families, and same-sex couples, as well as communities disproportionately impacted by COVID-19, including Black, Latino, and Native American and Alaska Native communities.

Limitation on Administrative Expenses

- Increase demographic data collection to further identify, monitor, and address service inequities. We will work with State partners to increase opportunities for the voluntary collection of race and ethnicity data through Enumeration at Birth and other Social Security number (SSN) card touchpoints, such as replacement applications. The increased data will help us determine whether different groups are underrepresented in our programs, provide insight into how different communities interact with our programs, and help us examine variability in program participation and benefit levels based on demographic makeup.

SSA's [Equity Action Plan 2023 Update](#) explains how we will measure our near and longer-term progress.

Improving Equity in the SSI Program

The complexity of the SSI program can pose challenges for some program applicants. Many of our customers may face barriers to conducting online business with us due to limited access to technology, housing insecurity, lack of credit history, difficulty understanding the procedures to establish online accounts, or reliance on third parties for assistance. We are revising our regulations and simplifying policies and business processes to make SSI easier and less burdensome for people, especially individuals facing barriers to access. As part of these efforts, in FYs 2024 and 2025, we plan to continue development and release of an online SSI application that is accessible, equitable, transparent, and responsive for customers.

In FY 2023, we launched a new SSI “Basic Needs” campaign in support of our FYs 2022–2023 Agency Priority Goal (APG):

Improve equity in our SSI program through increased outreach and improved benefit delivery, including to communities of color and underserved communities.

By September 30, 2023:

- Increase the number of all SSI applications by 15 percent, relative to the FY 2021 baseline, restoring rates closer to pre-pandemic levels.
- Increase the number of SSI applications from underserved communities by 25 percent, relative to the FY 2021 baseline.

In FY 2023, we received about 1.74 million SSI initial claims, which was about 1 percent short of our target. Our FY 2023 underserved applications target was about 128,000, and we exceeded it by receiving nearly 135,000 SSI initial claims from underserved communities.

Complexity in the SSI program can cause payment errors that may result in underpayments. We established a FYs 2024–2025 APG to:

Improve equity in the SSI program by increasing underpayment processing of our oldest and highest priority cases, including those disproportionately impacted by poverty.

- By September 30, 2025, complete 98 percent of SSI underpayments that have been identified as priority cases or pending for a year or more at the beginning of fiscal year 2024.

EO [13988](#), *Preventing and Combating Discrimination on the Basis of Gender Identity or Sexual Orientation*

We improved service delivery to advance gender equity in a variety of ways, including:

- Provided customers the option to self-select their sex (male or female) on their SSN record. Individuals no longer need to provide medical or legal documentation of their sex designation to make changes.
- Added an Inclusive Language Guide for our agency-wide internal and external publications. Inclusive language recognizes diversity, promotes respect, and fosters participation by all. This is particularly important for individuals who have been historically affected by inequality and persistent poverty, including but not limited to individuals in the Black or African American; Hispanic or Latino; Indigenous and Native American; Asian American, Native Hawaiian and Pacific Islander; Lesbian Gay Bisexual Transgender Queer and Intersex+; and immigrant communities, as well as individuals with disabilities.
- Implemented agency-wide Policy and Practices on Prohibiting Discrimination, Including Harassment, Based on Sexual Orientation, Gender Identity, or Gender Expression and provided training about the new policy and ways to foster an inclusive workplace culture.

EO [14035](#), *Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce*, and the [President's Management Agenda](#)

A well-trained, dedicated workforce that reflects the diversity of our customers is essential to accomplishing our mission. Our [DEIA vision](#) is to enhance the richness of our workforce diversity and sustain an inclusive work environment where individual differences are valued, and employees are treated with dignity and respect.

We implemented four goals to promote a culture where DEIA principles are foundational norms:

- Hire and promote the nation's talent and build a diverse and representative workforce through an open and fair process consistent with merit systems principles;
- Ensure that all employees have equal opportunities to advance in their careers and grow as leaders by mitigating any potential biases or barriers to professional development and promotions;

Limitation on Administrative Expenses

- Expand the availability of DEIA training to promote a respectful, safe, and inclusive workplace, and foster an increased understanding of implicit and unconscious bias; and
- Improve accessibility to employees with disabilities; enhance data collection and analysis of reasonable accommodation (RA) requests to inform agency RA policies; and increase function, evaluation, and compliance of [Section 501 of the Rehabilitation Act of 1973](#), which prohibits discrimination against people with disabilities in Federal Government employment, and the [Architectural Barriers Act Accessibility Standards](#) (ABAAS).

In support of these goals, we accomplished the following actions in FY 2023:

- Completed a Barrier Analysis Findings Report in June 2023 to conduct analyses on groups by race, ethnicity, and sex for identifying barriers to equal employment opportunities. We used the information in the analysis to guide our recruitment and employee development efforts.
- Expanded recruitment efforts by increasing engagement with colleges and universities, including 56 HBCUs, and over 200 law schools with diverse student populations.
- Attended over a dozen college and career fairs throughout the country to promote Federal service and recruit individuals from historically disadvantaged backgrounds.
- Increased our talent pool by advertising job openings on diverse talent platforms such as Handshake, PracticePro, Hootsuite, and the Department of Labor Workforce Recruiting Program database. Used inclusive language to strengthen recruitment efforts for underrepresented talent in Black or African American, Hispanic, or Latino, Asian American, Native Hawaiian, and Pacific Islander, and Native American communities.
- Provided employees with opportunities to advance in their careers and grow as leaders by expanding our National and Regional Leadership Development Programs. These development programs included leadership development, job shadowing, and internal resume trainings and reached over 1,800 employees.
- Delivered a four-part National Leadership Development Program (NLDP) Preparatory Series, preparing prospective applicants to the NLDP with learning interventions on virtual interviewing techniques, behavioral-based questions, leadership competencies, and writing convincing applications.
- Hosted mentoring events, enabling over 5,000 employees to interact with agency leaders and gain valuable insights. Also, established 400 mentor and mentee pairs in our national mentoring program.

Limitation on Administrative Expenses

- Collaborated with eight special emphasis Advisory Councils (i.e., employee resource groups) to deliver agency-wide leadership and development training to over 2,000 employees.
- Conducted diversity training for managers on recruitment activities and created a Smart Hiring Guide that instructs managers on DEIA principles, how to attract candidates, forming interview teams, and recommendations on conducting interviews and selecting candidates, which contributed to a 3,342 net hiring gain in FY 2023.
- Developed the Veterans New Hire website to include benefits information and links for employees to obtain information about veterans' benefits.
- Added inclusive language to the SSA Careers website that promotes DEIA and highlights positions for which the agency is hiring, including links to the Office of Personnel Management development tools and videos, which explain the Federal hiring process, and provide insights on the various special hiring authorities available to interns, recent graduates, and targeted populations, such as veterans and people with disabilities.
- Developed and implemented Adjudicator training to increase the ability to recognize and remove barriers to fair and equitable disability determination decision-making. Over 18,000 employees completed the training as of February 2024.
- Conducted a three-session Disability Awareness Summit that provided training to over 90 RA coordinators and stakeholders on various disability and RA topics.
- Updated the language in the Public-Facing Offices Technical Design Guide to further assist our internal facilities team and contractors in designing facilities that are fully ABAAS compliant.
- Designed and installed all-inclusive restroom signage in SSA headquarters facilities, with plans to install more signage to regional office restrooms in FY 2024.
- We will continue to advance DEIA goals in FYs 2024 and 2025.

EO [14031](#), *Advancing Equity, Justice, and Opportunity for Asian Americans, Native Hawaiians, and Pacific Islanders*

Our commitment to advance equity, justice, and opportunities for Asian American, Native Hawaiian, and Pacific Islander (AA and NHPI) communities included the following actions:

- Promoted language access with a focus on AA and NHPI communities. We made linguistic updates to visitor intake kiosks to facilitate the check-in process. Employee volunteers from all regions with proficiency in reading, writing, and speaking multiple languages created and translated publications and materials in various languages, including Cambodian, Cantonese, Gujarati, Hindi, Hmong, Korean, Mandarin, Punjabi, Tagalog, and Vietnamese.

Limitation on Administrative Expenses

- Developed a LEP Policy for Federally Conducted Programs to ensure that persons with LEP and individuals who are deaf or hard of hearing (D/HOH) have equal access to our services. LEP persons are defined as individuals who do not speak English as their primary language, and who have a limited ability to read, write, speak, or understand English. An individual who is D/HOH also may have limited proficiency in spoken or written English and may not be proficient in American Sign Language or any other recognized sign language. We will review and update this policy bi-annually.
- Created a LEP Communications Hub for employees, and an internal SharePoint site and resource center containing LEP policy, procedures, guidelines, training, resource materials, data, and more for ease of reference when assisting our customers with LEP.
- Increased and improved partnerships with the White House Initiative on Asian Americans, Native Hawaiians, and Pacific Islanders to address Compact of Free Association (COFA) [IF12194 \(congress.gov\)](#) barriers. We increased collaboration to identify barriers and ultimately improve access to services for COFA citizens, and released updated resources for COFA to the White House Initiative on Asian Americans, Native Hawaiians, and Pacific Islanders Workgroup, including how to apply for a new or replacement SSN card, benefits, and services.
- Established an essential presence at the Federal Emergency Management Agency Disaster Recovery Center in Lahaina, HI. We served approximately 400 community members and offered personalized attention to those affected by the Maui fires.
- Hosted an outreach table at the Organization of Chinese American Community Outreach Fair, which was part of their national conference in Washington, DC.
- Completed over 1,300 outreach activities ranging from electronically sharing our public information articles and materials to conducting in-person and virtual educational meetings and presentations. As a result, we effectively raised awareness and knowledge of our programs among the AA and NHPI communities.

EO [13175](#), *Tribal Consultation and Strengthening Nation-to-Nation Relationships*

The January 26, 2021, Presidential [Memorandum](#) on Tribal Consultation and Strengthening Nation-to-Nation Relationships requested a detailed plan of action for agencies to implement policies and directives of EO [13175](#). EOs [13985](#) and [14091](#) also include Indigenous and Native American persons in the definition of “underserved communities.”

Our Office of Native American Partnerships elevates and centralizes efforts to administer comprehensive programs and policies related to American Indians and Alaska Natives. The office enhances the agency’s relationship with Tribal communities, serves as the primary point of contact on Tribal affairs for all stakeholders, and develops and monitors compliance with annual Action Plans. The [FY 2023 Tribal Consultation and Call to Action Plan](#) (Action plan) builds

Limitation on Administrative Expenses

upon our [accomplishments in 2022](#) and reaffirms our commitment to robust engagement regarding policies that have Tribal implications. Our FY 2023 Action plan provided action for the following initiatives in support of EO [13175](#):

- Improve service delivery and equitable access to our programs
- Strengthen Tribal consultation
- Increase outreach and educational efforts to Tribal Communities
- Promote hiring of Native Students and retention of new hires
- Conduct data collection and analysis
- Provide resources to the Office for Native American Partnerships

Our accomplishments for FY 2023 are provided in the [2023 Tribal Consultation and Coordination Plan Progress Report](#).

In FYs 2024 and 2025, we will further implement our six initiatives detailed in our [FY 2024 Tribal Consultation and Call to Action Plan](#) in the following ways:

- Engage with Tribal Leaders in their Tribal homelands to build partnerships with community organizations and increase awareness of our desire to identify barriers and build solutions together to improve access to our programs.
- Pilot a plan to provide claims support to increase access to SSI applications in rural hospitals in Alaska.
- Request Tribal Leader input on where to implement memorandums of understanding to install new video equipment to bridge the distance between their Tribal community and our offices for claims or hearings.
- Engage with Tribal Coordinators in Urban Indian Centers in underserved communities to learn of their training needs and to build partnerships.
- Develop new training products on policy and SSI exclusions to help increase understanding of the impact on SSI benefits for those who receive financial support through Tribal benefits, with a focus on Trust and Per Capita Act policies.
- Engage with Tribal Leaders to build partnerships and identify Tribal Government officials who provide social services and may benefit from national training.
- Conduct outreach to increase knowledge of the LEP policy that covers Indigenous and Native American persons in collaboration with the Education Subcommittee of the White House Council on Native American Affairs.

Limitation on Administrative Expenses

- Develop strategies to translate targeted publications, market our interpreter services in Tribal communities, and implement new Tribal Outreach for Urban Indian Centers in LEP communities.
- Promote hiring of bilingual Native employees to support the 10-year National Plan on Native Language Revitalization and future deliverables for the annual White House Tribal Summit. To do so, we plan to form new partnerships with Tribal Colleges, Universities, and local community colleges in their Tribal homelands.

Additional information on many of these efforts is in the [*Equity Action Plan 2023 Update*](#), [*DEIA Strategic Plan 2022-2023*](#), [*AA and NHPI Action Plan*](#), [*FY 2023 Tribal Consultation and Call to Action Plan*](#), [*FY 2024 Tribal Consultation and Call to Action Plan*](#), [*Annual Performance Report for FYs 2023–2025*](#), and on [Performance.gov](https://www.performance.gov).

INFORMATION TECHNOLOGY

Introduction

Our information technology (IT) request for fiscal year (FY) 2025 demonstrates our commitment to improving service to the millions of people who expect timely and accurate assistance from us as a designated [High Impact Service Provider](#). In support of Executive Order (EO) [14058](#), *Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government*, we are establishing simple and secure services using human-centered design to provide a more consistent, equitable, and accessible experience for our customers, while reducing the manual processes that are burdensome for our employees. Please see the Customer Experience Exhibit in the LAE section for additional information on our progress and plans for improving customer experience.

We are expanding our robust cybersecurity program to support EO [14028](#), *Improving the Nation's Cybersecurity* and Office of Management and Budget (OMB) [Memorandum \(M-22-09\)](#), *Moving the U.S. Government Toward Zero Trust Cybersecurity Principles*. With funding we received from the Technology Modernization Fund (TMF), we are accelerating our Multifactor Authentication (MFA) project to improve our information security posture and reduce risks from compromised credentials. The funding allows us to expedite our plan to enable phishing-resistant MFA to additional systems on which our frontline personnel depend to provide essential services. In addition, we are strengthening our digital identity processes to comply with the *Creating Advanced Streamlined Electronic Services for Constituents Act of 2019*.

While we develop new IT capabilities, we must provide stable and secure access to our existing systems. We dedicate funding to the operations and maintenance expenses necessary to run our current systems, such as telecommunication costs, software maintenance, and refreshment of current infrastructure.

Table 3.24—Total Information Technology Systems (ITS) Budget Authority¹

(Dollars in Millions) ²	TAFS Code ³	FY 2023 ⁴	FY 2024	FY 2025
ITS New Budget Authority	28248704	\$1,424	\$1,214	\$1,422
Prior Year Transfer/Carryover	028X8704	\$133	\$250	\$200
IT Reimbursables	28248704	\$9	\$9	\$20
Recovery Act (National Support Center (NSC))	028X8704	\$0	\$0	\$0
Benefits Modernization (Dedicated No-Year Funding)	028X8704	\$0	\$0	\$50
Subtotal ITS		\$1,566	\$1,473	\$1,692
Internal Labor (Payroll)	28248704	\$673	\$725	\$767
Total		\$2,239	\$2,198	\$2,459

¹ Includes Benefit Modernization funding and excludes TMF for MFA.

² Note: Totals may not add due to rounding

³ The Treasury Appropriation Fund Symbol (TAFS) combines the Treasury agency or department code, the Federal account symbol, and the period of availability of the resources in the account.

⁴ Includes \$123,811 in Recovery Act Funding.

Limitation on Administrative Expenses

FY 2023 Accomplishments

Through the end of FY 2023, modernization initiatives have resulted in cost efficiencies as follows:

Table 3.25—Modernization Cost Avoidance and Efficiencies (in millions)			
Domain	FY 2018-FY 2022 Benefits	FY 2023 Benefits (projected)	Cumulative Benefits (projected)
Benefits	\$20.7	\$0.5	\$21.2
Communications	\$17.2	\$0	\$17.2
Disability	\$43.3	\$26.9	\$70.2
Earnings	\$15.2	\$0	\$15.2
Enumeration	\$212.1	\$67.0	\$279.1
Infrastructure	\$0	\$0.65	\$0.65
Service Delivery	\$24.7	\$0.02	\$24.7
Totals	\$333.2	\$95.0	\$428.2

Below, we describe some of our notable achievements in FY 2023:

- **Disability Case Processing System (DCPS2) usage extended to all 52 disability determination services (DDS) with no remaining processing exclusions.** DCPS2 now supports initial and reconsideration disability case processing across all DDSs and Federal disability processing components. 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 eliminated all remaining exclusion scenarios, and new cases are now being worked in DCPS2.
- **Hearings and Appeals Case Processing System (HACPS) delivered efficient case management across the agency.** 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 adding receipt, workup, scheduling, fiscal, and case closure functionality. As a result, we receipted over 318,600 cases in HACPS, representing 89.5 percent of total case receipts, and processed nearly 78 percent of all cases within HACPS. In May 2023, we introduced centralized mail processing and scanned almost 1 million pages by September 2023. We focused on scheduling functionality enhancements, allowing us to schedule over 400,000 hearings in HACPS, representing 74 percent of total hearings scheduled. Moreover, we eliminated nine categories of dual processing actions in the Case Processing and Management System in FY 2023 to further eliminate manual processing.
- **Enterprise Scheduling System (ESS) allows customers and technicians to schedule in-office enumeration appointments.** In FY 2023, we successfully deployed the ESS to all 50 States plus the District of Columbia. The product also facilitates workload management for field office managers by auto-assigning appointments based on staff availability. In FY 2023, ESS scheduled over 230,000 enumeration appointments. As of February 2024,

Limitation on Administrative Expenses

ESS has scheduled 695,295 enumeration appointments. Approximately 89 percent of these appointments were scheduled by the customer.

- **Technician Experience Dashboard (TED) expanded with new functionality.** TED serves as our official enterprise product to support and enhance front-line employee systems using a Customer Relationship Management solution. We expanded the TED product to the Boston, Philadelphia, Dallas, and New York Regions, as well as all Workload Support Units across the country. We added the ability for customers to submit documents electronically to SSA and released Registration Customer Support (RCS) Account Maintenance and In Person Identity (ID) Proofing functionalities.
- **Visitor Experience Product (VEP) provides check-in services for all field office visitors.** We expanded and improved the field office check-in process. We refined features and performance enhancements in the VEP in FY 2023 to include additional customer-facing ease-of-use improvements, migration to scalable cloud-based architecture, and improvements to back-end MI reporting. We began rolling out accessible kiosks with improved screen designs to speed up the check-in process. In addition, we released a new version of our User Experience Framework (UEF) design system, which aligns with the United States Web Design System (USWDS), in compliance with multiple EOs on customer experience. UEF 3.0 creates a consistent user experience across Federal websites, applications, and products SSA's customers and employees use. UEF 3.0 creates a consistent user experience across Federal web sites and applications, and across products used by SSA's customers and employees.
- **Office of Appellate Operations Case Processing System (OAOCPs) generated and sent over 67,000 letters to members of the public and their representatives.** Sending from OAOCPs reduced task time by approximately 60 percent for approximately 10,000 of the letters, which would have required manual printing and mailing if sent from the legacy system.
- **Quality Review Case Processing System (QRCPS) has replaced the legacy Disability Case Adjudication and Review (DICARS) and Disability Quality Review (DQR) systems.** As of September 2023, all 11 Office of Quality Review field sites now use QRCPS and have incorporated quality assurance procedures into continuing disability review (CDR) claims processing. Additionally, we have expanded and enhanced management information (MI) capabilities to support on-demand reporting.
- **Analytics and Disability Decision Support (ADDS)/ Intelligent Medical Analysis Generation (IMAGEN) expanded.** ADDS/IMAGEN uses advanced machine learning and predictive analytics technologies to transform and analyze claimant medical evidence to increase the efficiency and accuracy of disability determinations. The system has been deployed to DDS offices in all 50 States plus Washington, DC, and over 130 Federal disability processing component offices which include Extended Service Teams (EST), Disability Processing Branches (DPB), and Disability Processing Units (DPU). The system recorded over 2,000 daily active users. To date, we have processed over 40 million evidence documents and reviewed over 650,000 claims with IMAGEN.

Limitation on Administrative Expenses

- **CDR processes are easier for customers.** In FY 2023, we released CDR product functionality to allow adult beneficiaries with no representative payee to complete their CDR Report fully online. New online CDR processes are shorter, more user friendly, and have over 90 percent approval based on usability studies and over 80 percent customer satisfaction based on Medallia feedback about the online form, call center, and agency processes. The online Continuing Disability Review Report (i454) generates a significant time savings for employees, reducing the need for claimant recontact by pre-populating medical information into the online form and incorporating online edits, resulting in the collection of more complete and accurate information.
- **Electronic Evidence Acquisition (EAA) has enhanced interoperability and is processing more electronic data.** The EEA product added 20 health information technology (HIT) partners encompassing 2,687 facilities in FY 2023. The volume of HIT medical evidence of record (MER) increased nearly 17.3 percent over FY 2022 figures to reach over 2.28 million. At the end of FY 2023, the total electronic MER volume was over 8.5 million, an increase of more than 580,000 over FY 2022. Disability determinations that leverage the HIT program allow for faster decisions. Cases that fully utilize HIT are processed 40 percent faster than those that receive medical evidence traditionally through mail or fax. Additionally, the EAA product has enhanced interoperability with a focus on the successful onboarding/connection of two major new healthcare networks and establishing technical connectivity with one major new network. We currently have 233 partner organizations representing 37,858 provider facilities. We registered an additional 8,746 ERE users in FY 2023, an increase of 12 percent.
- **The Hearing Recording and Transcription (HeaRT) team developed the HeaRT infrastructure, including development and validation environments in FY 2023.** With broader rollout in FY 2024, HeaRT will eliminate the use of legacy Digital Recording and Processing (DRAP) hardware and software, resulting in costs savings and providing maximum flexibility for hearing participants. It will also produce an accurate automated transcription to eliminate the need for VHR note taking and assist with drafting decisions. HeaRT builds upon the Microsoft Video Indexer technology used since 2021 to create draft transcripts for cases appealed to the US District Courts. Preliminary estimates show that this process has cut internal transcription creation time by 50 percent, and achieves 97 percent accuracy for recordings created via Microsoft Teams.
- **21st Century Work Measurement captured workload analytics more effectively.** We effectively eliminated 99 percent of mainframe processing for work measurement by incorporating data into our Enterprise Data Warehouse (EDW). We transitioned data feeds from the mainframe-based Work Experience Reporting System.
- **21st Century Policy Net Proof of Concept (POC) introduced new tools for staff to easily reference and maintain policy.** In June 2023, we implemented the POC to assess the feasibility of using in-house cloud-based tools to demonstrate the key features of Policy Net in a highly scalable enterprise platform. The initiative demonstrated potential improvements to business processes for authoring policy and procedures, interface, user experience,

collaboration among reviewers and publishers, publishing process, searching, and locating policies. We completed an evaluation of the POC and determined appropriate next steps for FY 2024.

- **Consolidated Claims Experience (CCE) improved Title II, Title XVI, and Title XVIII claims processing.** We paused development of the CCE after deploying in August 2022 to address 146 of the 162 requests for fixes and enhancements. We resumed new development in FY 2024. In Q1 of FY 2024 we improved the Print and Signature page, decreasing the amount of time a technician would have to wait for a reprint.
- **Representative Payee System enhanced to make transactions more secure.** In FY 2023, we successfully released functionality to support recurring 5-year criminal background checks that will enhance the criminal history received in the electronic Representative Payee System. The product now also ensures we are performing background checks at least once every 5 years for all non-exempt representative payees for Social Security beneficiaries. The new functionality meets legislative requirements for the Strengthening Protections for Social Security Beneficiaries Act of 2018. In addition, this investment successfully generated and mailed over 3.1 million advance designation notices for the annual advance designation run.
- **We strengthened the security of our applications.** We secured TMF resources to accelerate MFA compliance for 315 applications. As of Q2 of FY 2024, 79 percent of those 315 applications are deployed with an approved application tier MFA solution in production. We are working toward full compliance across all platforms at the end of FY 2024, consistent with EO 14028 and OMB Memorandum M-22-09.
- **We continued retiring legacy applications.** Since the beginning of our IT Modernization period in FY 2018, we have retired 166 legacy applications. Approximately 1,633 applications remain operational.

Delivering Services Powered by 21st Century Technology and Prioritizing Cybersecurity

In FY 2024, we will modernize our IT to reduce the burden on the public, eliminate obsolete websites and online services, provide an improved customer experience, and implement initiatives such as Zero Trust Architecture. Many of our investments further our Many of our investments further our [Equity Action Plan](#) and [Equity Action Plan 2023 Update](#), and support Executive Order (EO) 13985, Advancing Racial Equity and Support for Underserved Communities through the Federal Government, and EO 14058, Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government.

In FY 2025, we will focus on modernizing our Benefits and Debt Management legacy systems.

Below we describe modernization initiatives underway in FY 2024, executed with a combination of FY 2023 funding and FY 2024 full-time equivalent resources. With anticipated funding levels in FY 2024 and FY 2025, we will maintain existing systems functionality and pursue modernization initiatives.

Limitation on Administrative Expenses

Mission Delivery

Benefits Modernization - \$78.7 million¹

The Benefits program area includes several investments to better serve our customers, improve the employee experience, and modernize enterprise legacy programmatic applications.

We have improved evidence processes and increased processing center automation. However, critical work remains to modernize our benefits systems to improve our technicians' efficiency and our customers' claims process. Core legacy systems are aging, and retirement-related attrition reduces the number of subject matter experts familiar with operating and maintaining these systems, posing a significant ongoing risk to efficiency of operations.

We have established a Benefits Modernization Program Management Office (PMO) with a single responsible executive and have dedicated resources specifically to modernizing our benefits systems. Of the total \$78.7 million requested for FY 2025, we are requesting \$50 million in dedicated no-year funding to sustain the progress of Benefits Modernization.

To ensure we are meeting expectations of our technicians early in the development process, we have developed a Title II Retirement Prototype. With this approach, and upfront feedback directly from technicians, we expect to have production-ready, web-based, technician-facing, modernized Retirement (Title II) and Medicare (Title XIII) functionality at the end of FY 2024. This release will be foundational for the Benefits Modernization, reducing the number of screens embedded in the flow employees use to process a claim. It will use modernized services, have improved navigation allowing employees to jump to where they need to be in the claim, and provide more direct access to “more info” and to Policy information. This Modernization effort will reduce reliance on antiquated systems and improve the user experience.

Initiative	Description
Benefits Modernization, Consolidated Claims Experience (CCE)	We will consolidate legacy mainframe systems and over 100 distinct regional supplemental applications into a single universal benefits processing experience that will adapt to future needs and automation processes. Our CCE system will support the claims taking and post-entitlement or post-eligibility process through the lifecycle of a claim for benefits.
SSI Application Simplification Project	In FYs 2024 and 2025, we plan to simplify our SSI application policy and procedure for adults, aged applicants, and children. In calendar year 2025, we plan to incorporate the simplified process into the mobile first online application.

Data Modernization - \$6.2 million

This programmatic area includes investments in data collection, standardization, and rationalization. Efforts support the collection of MI and business intelligence (BI) data from

¹ The \$78.7 million in FY 2025 includes \$50 million in dedicated no-year funding for Benefits Modernization.

Limitation on Administrative Expenses

programmatic applications and legacy data stores, and assist in standardizing access to agency-wide data, reporting, and analytics to make data-driven decisions. Below, we have outlined the modernization initiatives planned in FY 2024. In FY 2025, we will maintain existing functionality.

Initiative	Description
Person Information (PI)	PI provides the ability to view and update Identity, Death, Citizenship, Contact, Marriage, and Accommodation information. The PI investment is positioned to be our Customer Record database. PI enhances the customer and technician experience by providing an enterprise-level authoritative data source for information related to our customers and eliminates redundancies and inconsistencies in collection and storage of customer data. In FY 2024, we will expand functionality of PI to handle unenumerated individuals and integrate PI with SSI Application Simplification and other programmatic applications to improve the technician and customer experience.
Enterprise Data Warehouse (EDW) Business Intelligence & Data Analytics Ecosystem	The goal of the EDW is to consolidate and integrate enterprise-level data managed as a strategic business asset within a secure modern architecture that supports data-driven decision-making. Our FY 2024 goals include increasing the availability of MI and BI content in our production environment and integrating additional programmatic data sources.

Disability Modernization - \$41.0 million

The investments in the disability programmatic area provide efficiencies and consistency and enhance quality in our processes. Users include employees, advocates, attorney representatives, and members of the public. Below, we have outlined the modernization initiatives planned in FY 2024. In FY 2025, we will maintain existing functionality.

Initiative	Description
DCPS2 Enhancements	DCPS2 shifted its development focus in FY 2024 to new functionality that builds on system efficiencies in DDS claim processing. FY 2024 activities will focus on IMAGEN integration, ERE and Health Information Technology (HIT) functionality, and additional efficiencies to reduce processing times.
Hearings and Appeals Case Processing System (HACPS)	HACPS provides a modern, seamless national claims-processing system for the hearing offices to support timely, consistent, and quality case processing. We will develop HACPS functionality to allow users to process most hearing level cases from case receipt to case closure, without using legacy applications (Case Processing and Management System and Document Generation System). This functionality will create efficiencies by eliminating dual keying in legacy systems and HACPS. Our FY 2024 focus is on scheduling enhancements and enhanced MI reporting.

Limitation on Administrative Expenses

Initiative	Description
Analytics and Disability Decision Support (ADDS)-IMAGEN	The ADDS initiative leverages the specialized data analytics platform created by the IMAGEN project to help adjudicators make informed decisions. FY 2024 initiatives include workload prioritization and management, expedited adjudication, and optimized customer service using machine-learning to predict development needs, suggest next case processing steps, and ensure effective routing and management of cases throughout the development and adjudicatory cycles.
Electronic Evidence Acquisition (EEA)	The EEA initiative enables the electronic submission of medical evidence required for disability determinations. FY 2024 work will focus on improving interoperability with HIT partners, workload optimization and efficiency increases, and modernization of our ERE system to improve reliability and availability of secure electronic records submission.
Continuing Disability Review (CDR) Product	In FY 2024, our CDR product will focus on replacing and retiring the legacy eWork system used for processing Work CDRs. Decommissioning eWork's obsolete, unsupported technologies is a necessary modernization step toward compliance with MFA initiatives.
Quality Review Case Processing System (QRCPS)	We will continue development of QRCPS with an end goal of replacing legacy DICARS and DQR systems. FY 2024 goals include enhanced data collection and trend analysis in support of reducing overall case processing times.
Hearing Recordings and Transcriptions (HeaRT) via Microsoft Teams	We are migrating from the legacy DRAP system to a commercial cloud-based solution that will automate most of the recording and transcription processes. This transition will improve system reliability and reduce reliance on costly transcription services. In FY 2024, the HeaRT product will eliminate reliance on a Verbatim Hearing Reporters to type log notes and improve the quality of available hearing recording documentation by generating accurate, consistent transcripts to assist hearing offices with drafting decisions. We plan a broader rollout for HeaRT in FYs 2024, concluding in FY 2025 with rollout to all hearing offices.

Earnings and Enumeration Modernization - \$6.1 million

The enumeration product will expand the functionality of online enumeration services and expedite the processing of Social Security cards. These initiatives support critical services for the number holder and improve the customer experience.

The earnings product will transform our IT and business processes by enabling customers and Federal partners to submit and track wage information in a streamlined, accurate, and secure way.

Below, we have outlined the modernization initiatives planned in FY 2024. In FY 2025, we will maintain existing functionality.

Initiative	Description
Enumeration Product	The Enumeration Product is expanding the functionality of online enumeration services and expediting Social Security card processing. We will identify and develop fully automated processes to complete Social Security Number card transactions for our customers and reduce foot traffic to our field offices. We are developing an application that will help expedite enumeration applications when an individual does need to visit a field office. In addition, we are making our enumeration products easier to use to save processing time. In FY 2024, we expect to explore a new Spanish language version of the Social Security Number Application Process (SSNAP), continue State rollout for automated processing of name-change and simple replacement card services, continue discovery for a re-write of our aging SSNAP program, and initiate an Enumeration MI solution to improve operational oversight.

Program Integrity - \$18.2 million

This programmatic area includes investments to stay current and compliant with Treasury regulations and systems upgrades related to post payment activity, modernize and enhance our audit trail functions, and provide modern and efficient tools to support our anti-fraud program.

Below, we have outlined the modernization initiatives planned in FY 2024. In FY 2025, we will focus on investments to address overpayments, including IT investments to prevent overpayments before they occur.

Initiative	Description
Anti-Fraud Product	The Anti-Fraud product will replace the iSSNRC Public Facing Integrity Review process and migrate the iClaim process from the legacy Anti-Fraud Program Infrastructure to the new Advanced Modeling and Analytics Facility environment. This will make the iClaim fraud analysis process more efficient and seamless. We also intend to enhance the BI Reporting for Allegation Referral Intake System by developing new Fraud Analyst Reports.
Debt Management Product	In FY 2025, we will modernize systems to help address overpayments before they occur and modernize our debt management systems. We will also explore opportunities to advance modernization efforts in FY 2024.

Service Delivery Modernization - \$25.8 million

The Service Delivery programmatic area focuses on expanding and streamlining self-service channels for our customers while also improving tools our technicians use to serve the public.

Below, we have outlined the modernization initiatives planned in FY 2024. In FY 2025, we will maintain existing functionality.

Limitation on Administrative Expenses

Initiative	Description
Technician Experience Dashboard	This investment proposal seeks to continue development and maintenance of Customer Engagement Tools, an official enterprise product, to redefine and modernize the technology and processes our staff use to manage customer service requests. The primary goal is to expand on a unified solution to all field offices in FY 2024 to improve the experience and increase efficiency of our customer service employees. In FY 2024, we will focus on refining customer service intake processes, optimizing data connections to related systems, and building workflows that allow technicians to initiate work in a single, comprehensive system, rather than task switching between multiple systems.
Online Experience	Planned functionality for FY 2024 includes the ability for customers to change address information for dually entitled individuals and non-beneficiaries, update mobile phone numbers, sign up for Direct Express, and provide voluntary tax withholding information. We will also move Upload Documents (formerly eSubmit) behind my Social Security and enhance the claims status tracker and earnings correction screener.
Visitor Experience Product (VEP)	More than 1,300 SSA field offices, card centers, and foreign service posts use VEP to manage appointment and non-appointment services. Managers use Visitor Intake Process-Rewrite (VIPr) to assign and monitor employee interview activities, input high risk incidents, and analyze MI. In FY 2024, we will modernize the kiosk software to allow scannable codes for efficient appointment management. We will also integrate VIPr software with ESS, TED, and the Customer Help Information Program (CHIP) to support technician functions.
21st Century PolicyNet (21CPN)	21CPN will replace our legacy policy management system, PolicyNet. We completed the POC for 21CPN in FY 2023. In FY 2024, we plan to address policy authoring, search, and publishing enhancements, and begin developing daily update functionality.
Upload Documents (formerly eSubmit)	The goal of Upload Documents is to provide an alternative service delivery channel for both our customers and technicians for submitting forms and documents. Upload Documents will empower technicians working on a claim or post-entitlement action items to contact customers and request documents electronically. Our FY 2024 objectives include adding third-party forms to the inventory of forms available to technicians, integrating Upload Documents with the my Social Security portal, completing discovery for a customer self-service option, and adding web-forms to streamline the customer's submission process. This investment will convert current paper-laden work, including mail, to digital forms, reducing the time staff spend scanning and uploading documents.

Initiative	Description
Customer Help Information Program (CHIP) Enhancements	National 800 Number Network agents use the CHIP application to handle telephone inquiries from the public in an accurate, consistent, and efficient manner. For FY 2024, we will provide updates to several workflow areas, including benefit estimates, benefit screening, and direct deposit. The updates will modernize the 28-year-old legacy CHIP application by streamlining workflows, business processes, policy and instructions providing a more guided step by step path for National 800 Number Network agents answering inquiries. This includes a more user-friendly interface for the National 800 Number Network agents that reduces the need to use multiple systems and queries to view customer information and perform required actions by interfacing with other SSA systems. In FY 2024, modernized workflows will include the ability to provide a benefit estimate and screen callers for eligibility of potential benefits (e.g., Title II, Title XVI, Medicare). In addition, users will have the ability to make direct deposit updates (e.g., add, change, cancel) for beneficiaries and identify and report fraud when appropriate. We anticipate that when completed in their entirety, the modernization efforts, we will realize a reduction in average handle time.
Mail Centralization and Digitization	The Mail Centralization and Digitization investment will digitize incoming mail to relieve stress on Operations' frontline staff who currently scan and upload mail to agency systems. In FY 2024, we plan to engage in discovery to determine the most effective manner to deliver this capability and ensure it is integrated effectively into agency workflows and related systems. This investment is closely related to Upload Documents, as it is moving digitized information into a workflow and ultimately to the technician for action.
Creating Advanced Streamline Electronic Services (CASES)	In FY 2024, this investment will expand the consent and authorization to disclose Privacy Act-protected records and the consent for the subject of the records to investigate and develop electronic requests to access their Privacy Act protected records. In addition, the investment expects to add online payment to the current product and expand the types of records the agency can disclose.
Enterprise Scheduling Solution (ESS)	In FY 2024, our ESS initiative will complete rollout of enumeration service scheduling to remaining U.S. territories and begin discovery and initial development of self-scheduling for initial claims services.

IT Infrastructure, IT Security, and IT Management

In FYs 2024-2025, we will prioritize funding to modernize our legacy systems and infrastructure and ensure funding to implement the requirements of EO [14028](#), *Improving the Nation's Cybersecurity*, and OMB [M-22-09](#), *Moving the U.S. Government Toward Zero Trust Cybersecurity Principles*. These activities will support our transition to a digital organization that fulfills our mission through millions of customer interactions every year.

Limitation on Administrative Expenses

Please see Appendix A for detailed cost breakdown by investment for fiscal years 2023, 2024, and 2025.

Cybersecurity - \$262.1 million

Cybersecurity is vital to protecting the personally identifiable information of everyone we serve. Maintaining the public’s trust in our ability to protect sensitive data housed in our systems requires advanced cybersecurity controls, constant assessment of the threat landscape, and continual improvements of our cybersecurity program. We use a risk-based approach to balance protection and productivity and focus on continuous improvement. Our Chief Information Security Officer (CISO) oversees and prioritizes our cybersecurity program funding. The Chief Information Officer (CIO) provides executive approval and prioritizes IT spending, balancing a customer-first approach with agency cybersecurity needs.

In alignment with EO [14028](#), *Improving the Nation’s Cybersecurity*, and OMB guidance, our budget request includes funding necessary to implement the requirements and support additional Supply Chain Risk Management services. We will acquire software tool subscription services that will assist us in identifying:

- Counterfeit components and high-risk suppliers;
- Corporate ownership and corporate relationships;
- If a company has been involved in commerce or trade violations; and
- If a company has financial weakness, which could lead to the company being more receptive to vulnerabilities or subversion.

In compliance with EO [13556](#), *Controlled Classification Information*, we implemented the Controlled Unclassified Information (CUI) program. Employees must follow the CUI policy in Administrative Instructions Manual System Chapter 21 to apply markings to CUI when sending sensitive information to outside entities that are not part of the agency's process for administering claims, post-entitlements, enumerations, earnings, etc., and when disseminating, physically safeguarding, decontrolling, destroying, and transferring CUI.

Efforts in this area also help us to maintain our vigilance and protect against network intrusions and improper access of data by strengthening our defensive cyber capabilities, sharing cyber threat information with our Federal and industry partners, conducting enhanced penetration testing, and moving toward a Zero Trust Architecture that focuses on the secure flow of information from the network perimeter across the enterprise. These efforts will also improve our resilience and ability to recover IT and business operations, as well as build a robust ability to monitor and detect potential insider threats.

Please see Appendix B for more detailed cost breakdown of our Cybersecurity costs throughout the IT portfolio.

Initiative	Description
Digital Identity	Our Digital Identity product allows us to secure online, public-facing applications in alignment with Office of the Inspector General and Internal

Limitation on Administrative Expenses

Initiative	Description
	Revenue Service audit findings or recommendations. We are developing both short-term and long-term authentication strategies by incorporating 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. In FY 2024, we will reduce redundancy in our datastores to improve process efficiencies and work toward standardizing authentication processes for digital services to eliminate siloed work efforts and create uniformity.
Integrated Registration Services (IRES)	We operate several Business-to-Government and Government-to-Government services on a legacy application. These services are essential to a diverse range of partners including Federal, State, local, and Tribal government entities; claimants' legal representatives; medical and educational institutions; and employers. We intend to retire IRES and move existing business and government services to our modern identity framework, which will allow users to authenticate with Login.Gov and ID.me credentials. In FY 2024, we plan to complete migration to align with Zero Trust guidelines in OMB M-22-09 , <i>Moving the U.S. Government Toward Zero Trust Cybersecurity Principles</i> , which requires MFA.
Multi Factor Authentication (MFA) and Encryption	We will implement MFA to secure high value assets at the application and system level per EO 14028 , <i>Improving the Nation's Cybersecurity</i> . The TMF will support our efforts to accelerate MFA in FYs 2023 and 2024. We will prioritize internal systems for conversion to the enterprise MFA solutions and invest resources as part of our MFA Acceleration Plan. We will deploy MFA to the mainframe, our agency-issued mobile devices and services, and external-facing systems. We will implement data-in-transit encryption for all information systems in FY 2024.
Reengineered Comprehensive Integrity Review Project (R-CIRP)	We are modernizing our integrity review processes to utilize a more agile-friendly platform capable of applying predictive analysis in line with industry standards. All processes will be centralized into one application to retire legacy applications, reduce integrity review workloads for field office managers, and improve audit practices to identify anomalies for possible fraudulent activities. The integrity review process is a key component of our security governance and financial audit compliance.

Infrastructure - \$1,564.5 million

The infrastructure initiatives provide the overall foundation on which we design, develop, and operate our IT. They also ensure the sustained operation of current IT and provide an environment to support the growth of our new system and technical infrastructure.

As customers use more online options to conduct business with us, we need to establish centralized management of electronically submitted forms, evidence, and other documentation. In FYs 2024-2025, our Enterprise Middleware Electronic Submissions (EMES) initiative will

Limitation on Administrative Expenses

support the development of an enterprise technical solution for the request, receipt, transmission and routing of electronic evidence and forms, including an enterprise solution to digitize our inventory of public-facing forms. This work is critical for related Upload Documents and eSignature efforts in the near term, and promises to reduce reliance on multiple, siloed electronic evidence and forms management systems in the future. Additionally, in FY 2024, we will migrate content for Disability, Survivor, and Family benefits to the new content management system to make it easier to keep important customer-facing content up to date.

We continue to mature the underlying infrastructure that automates manual workflows and gives technicians more time to address complex customer needs. Our Robotic Process Automation (RPA) system allows for software "bots" to complete some workload tasks. In FY 2024, we intend to expand automations for components across the agency, introduce automations to further drive efficiency gains, and create bridges that allow critical systems to interact with one another. We will continue the migration of legacy SharePoint 2016 and 2019 sites to SharePoint Online or other appropriate open systems platforms to reduce oversight complexity.

Initiative	Description
Application	<p>This initiative supports enterprise-wide software for our IT operations, including the analysis, design, development, coding, testing, and release services for application development. These centralized services are critical for implementing new functionality, including public-facing applications that include:</p> <ul style="list-style-type: none">• User-centered development, testing, and standards, ensuring that applications comply with Section 508 and Enterprise Architecture standards;• Enterprise services that allow business and data services to be consumed from any valid infrastructure provider;• Modern development environment and architecture that provide a set of development tools with an agile and cloud-based testing environment;• Development, support, and enhancements to a modern cloud database infrastructure;• Enterprise data administration conventions establishing data entities and attributes that ensure data integrity;• Business process automation technology to allow employees to focus on higher level workflows requiring analysis; and;• Testing improvements through collaboration with relevant stakeholders to determine best practices.• Compliance with draft implementation guidance on <i>Advancing Governance, Innovation, and Risk Management for Agency Use of Artificial Intelligence</i>.
Data Center and Cloud	<p>Our data centers maintain data repositories and acceptable service level availabilities for our services to the public. We meet increasing online public service demands and exceed our 99.8 percent operational service level targets. The data centers ensure the availability, changeability, stability, and security of our IT architecture.</p>

Initiative	Description
	<p>Improvements to the data center fabric support our IT modernization. We employ a comprehensive data center infrastructure management program. We are replacing our IT Operations Management technologies and practices in a multi-year effort that is essential to effectively managing our IT capabilities in a hybrid cloud ecosystem.</p> <p>We enhance our Business Resilience automation and practices to provide cloud-like, geo-dispersed resilience. Our role swap mainframe initiative uses a set of automation technologies and resilience practices that allow systems running on mainframe servers to be relocated to different data centers as business or environmental circumstances demand.</p> <p>This investment also includes mainframes and servers. We will execute a mandatory mainframe storage refreshment.</p>
End User	<p>The End User standard investment provides us with the productivity software, laptops, and other computing equipment required to meet growing workload demands for our over 60,000 Federal and 14,000 DDS employees across the nation.</p>
Network	<p>The Network standard investment provides secure, easy-to-use, and fast electronic service via the internet through telephone services, wide area network, and video teleconferencing systems. This investment allows us to maintain current systems and to enhance and refresh telecommunications equipment. It also provides ongoing improvement of connectivity and bandwidth for data, voice, and video communications. The investment benefits the public as an effective, efficient, economical, and secure method of providing both digital and online services.</p> <p>In alignment with OMB M-19-16, <i>Centralized Mission Support Capabilities for the Federal Government</i>, we initiated the Enterprise Infrastructure Solutions (EIS) initiative. EIS is a multiple-contract vehicle designed by the General Services Administration (GSA) to allow Federal agencies to procure telecommunications and IT solutions (i.e., voice, video, data transport). We procure approximately \$245 million worth of services annually from the GSA contracts.</p> <p>Pursuant to OMB M-21-07, <i>Completing the Transition to Internet Protocol Version 6 (IPv6)</i> and in alignment with EO 14208, <i>Improving the Nation's Cybersecurity</i>, we are committed to transitioning communications to IPv6. We are currently in the planning and requirements gathering phase of the development lifecycle and will dedicate both Federal and contractor resources to support the effort.</p>

Limitation on Administrative Expenses

Initiative	Description
Platform	The Platform standard investment provides enterprise-wide platform capability that includes database, middleware, ² mainframe database, and mainframe middleware. The Platform Center of Excellence will serve as our central point for the analysis and integration support of our expansion of common platforms. It will support platform strategy and roadmap; vendor analysis; governance; product management integration; product or project platform evaluation; portfolio management; resource enablement; enterprise architecture and Architecture Review Board sign off; and value monitoring of application platforms.
Output	The Output standard investment provides central print services.

IT Governance & Other Support - \$200.9 million

This Programmatic Area drives product strategy and operations, facilitates accessibility and user/customer experience, and develops the framework and governance standards for Product and Project Management.

Initiative	Description
Delivery	This Technology Business Management (TBM) aligned standard investment provides management and resources to support our IT operations, including enterprise-wide product and project management resources to assist with agile development, and our Investment Management Tool for project management reporting. This investment drives product strategy and operations, facilitates accessibility and customer experience, and develops the framework and governance standards for Product and Project Management.
IT Management	<p>The IT Management standard investment captures all costs associated with IT management and strategic planning (including CIO and other senior leadership full-time equivalent costs), enterprise architecture, capital planning, IT budget and finance, IT vendor management, general IT policy and reporting, and IT governance.</p> <p>This investment is responsible for establishing and executing processes in direct support of CIO authority enhancements per the Federal Information Technology Acquisition Reform Act (FITARA). We have leveraged the authorities afforded by FITARA to improve how we acquire, manage, and organize our IT investments. These processes employ sound risk management processes in alignment with the agency's Enterprise Risk Management (ERM) principles, including identifying, measuring, monitoring, and controlling risks; transparent decision-making; effective communication; and prioritization of risk.</p>

² Middleware is software that connects software components or applications with our master file data. Middleware sits "in the middle" between application software that may be working on different operating systems.

Limitation on Administrative Expenses

Initiative	Description
	This investment includes the agency contributions to GSA in support of the Technology Transformation Services reimbursable program in FY 2025.

Support for Existing Agency Applications \$255.3 million

We must maintain stable and secure access to existing applications to serve the public. Investments in this area ensure service without disruption and compliance with various laws and requirements.

Initiative	Description
IT Investments for Mission Delivery	It is critical that we maintain the applications employees use to serve the public and the services used by the public to conduct online transactions with us. Programmatic areas within this category include Benefits; Data and BI; Disability, Hearings, and Appeals; Earnings and Enumeration; Program Integrity; and Service Delivery.
IT Investments for Mission Support Services	Investments include ongoing maintenance and operations for our existing services and support systems within the administrative applications programmatic area. This includes investments that ensure compliance with applicable accounting principles and support development and maintenance of electronic personnel functions and records management requirements. Investment areas include E-Government Initiatives; ³ Financial Systems; HR Investments; and Records Management. As required, we have confirmed that our IT Budget planning materials reflect the required contribution levels for each E-Government or Line of Business initiative.

³ Note that the Integrated Award Environment E-Government initiative includes the funding required to reimburse a proportional share of the costs to GSA for extending Data Universal Numbering Transition support, allowing additional time for implementation of the Unique Entity Identifier.

Table 3.26—Appendix A: FY 2025 Agency IT Portfolio Summary

FY 2025 Agency IT Portfolio Summary Costs in Millions*	Total Cost			Internal Labor			External Labor			ITS Funds		
	FY 2023	FY 2024	FY 2025	FY 2023	FY 2024	FY 2025	FY 2023	FY 2024	FY 2025	FY 2023	FY 2024	FY 2025
IT Portfolio Total*	\$2,238.9	\$2,197.5	\$2,458.8	\$673.1	\$724.5	\$766.9	\$400.8	\$329.4	\$367.2	\$1,165.1	\$1,143.5	\$1,324.6
Mission Delivery	\$419.7	\$347.0	\$385.0	\$219.5	\$241.4	\$234.3	\$170.4	\$66.1	\$104.4	\$29.8	\$39.5	\$46.2
Benefits Systems Modernization	\$27.0	\$23.1	\$78.7	\$16.2	\$23.1	\$28.7	\$10.8	\$0.0	\$50.0	\$0.0	\$0.0	\$0.0
Benefits Modernization	\$27.0	\$23.1	\$78.7	\$16.2	\$23.1	\$28.7	\$10.8	\$0.0	\$50.0	\$0.0	\$0.0	\$0.0
Benefits	\$58.3	\$54.2	\$56.3	\$48.1	\$44.9	\$51.9	\$10.1	\$7.6	\$2.8	\$0.0	\$1.7	\$1.7
Representative Payee Support Systems	\$2.6	\$1.1	\$1.3	\$2.6	\$1.1	\$1.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Benefits Systems Support	\$41.6	\$33.8	\$38.6	\$37.7	\$29.8	\$35.8	\$3.9	\$3.9	\$2.8	\$0.0	\$0.0	\$0.0
Benefits Systems Updates	\$14.0	\$19.3	\$16.3	\$7.8	\$13.9	\$14.7	\$6.3	\$3.7	\$0.0	\$0.0	\$1.7	\$1.7
Data and Business Intelligence	\$57.5	\$59.3	\$54.7	\$15.9	\$18.7	\$19.3	\$32.7	\$31.4	\$25.6	\$8.9	\$9.2	\$9.8
Business Intelligence - Data Analytics	\$43.6	\$51.6	\$48.6	\$10.8	\$11.0	\$13.2	\$24.0	\$31.4	\$25.6	\$8.9	\$9.2	\$9.8
Data Modernization	\$13.9	\$7.7	\$6.2	\$5.2	\$7.7	\$6.2	\$8.7	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Disability, Hearings, & Appeals	\$134.9	\$104.1	\$87.7	\$66.7	\$72.2	\$66.8	\$52.6	\$12.4	\$4.8	\$15.6	\$19.5	\$16.1
Disability Determination Services (DDS) Automation	\$4.6	\$6.2	\$1.7	\$1.2	\$0.4	\$0.0	\$0.0	\$0.0	\$0.0	\$3.4	\$5.8	\$1.7
Disability Claim Processing Applications	\$44.1	\$45.9	\$45.1	\$25.1	\$24.3	\$26.7	\$7.6	\$8.5	\$4.7	\$11.3	\$13.0	\$13.7

Limitation on Administrative Expenses

Disability Modernization	\$86.3	\$52.1	\$41.0	\$40.5	\$47.5	\$40.1	\$45.0	\$3.9	\$0.1	\$0.8	\$0.7	\$0.7
Earnings & Enumeration	\$25.6	\$23.4	\$22.3	\$21.5	\$21.7	\$21.2	\$4.1	\$1.7	\$1.1	\$0.0	\$0.0	\$0.0
Earnings and Enumeration Modernization	\$11.7	\$7.7	\$6.1	\$8.7	\$7.6	\$6.1	\$3.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0
Earnings Support Systems	\$10.9	\$11.2	\$12.4	\$10.5	\$10.8	\$12.2	\$0.4	\$0.4	\$0.2	\$0.0	\$0.0	\$0.0
Enumerations Support Systems	\$3.0	\$4.5	\$3.7	\$2.3	\$3.3	\$2.9	\$0.8	\$1.1	\$0.9	\$0.0	\$0.0	\$0.0
Program Integrity	\$27.3	\$23.5	\$39.8	\$16.3	\$11.1	\$15.7	\$7.8	\$4.1	\$13.5	\$3.3	\$8.2	\$10.6
Anti-Fraud Product	\$6.1	\$3.6	\$7.7	\$1.8	\$3.6	\$2.6	\$4.3	\$0.0	\$5.0	\$0.0	\$0.0	\$0.0
Anti-Fraud Support Systems	\$9.1	\$15.0	\$17.1	\$2.8	\$3.1	\$2.9	\$3.0	\$3.6	\$3.6	\$3.3	\$8.2	\$10.6
Debt Management Product	\$7.5	\$0.9	\$10.5	\$7.5	\$0.9	\$6.0	\$0.0	\$0.0	\$4.5	\$0.0	\$0.0	\$0.0
Payment Accuracy Support Systems	\$4.6	\$4.0	\$4.5	\$4.1	\$3.4	\$4.1	\$0.4	\$0.6	\$0.4	\$0.0	\$0.0	\$0.0
Service Delivery	\$89.1	\$59.4	\$45.4	\$34.7	\$49.7	\$30.8	\$52.3	\$8.9	\$6.7	\$2.1	\$0.8	\$8.0
Electronic Services	\$13.7	\$16.2	\$15.3	\$7.4	\$7.8	\$8.8	\$6.1	\$8.4	\$6.4	\$0.2	\$0.0	\$0.1
Notice Improvements	\$4.6	\$5.0	\$4.4	\$4.5	\$4.6	\$4.1	\$0.0	\$0.4	\$0.3	\$0.0	\$0.02	\$0.02
Service Delivery Modernization	\$70.8	\$38.1	\$25.8	\$22.7	\$37.3	\$17.9	\$46.2	\$0.0	\$0.0	\$1.9	\$0.8	\$7.9
Mission Support Services	\$41.3	\$46.8	\$45.4	\$15.9	\$16.1	\$19.0	\$9.3	\$14.9	\$14.9	\$16.0	\$15.8	\$11.5
Admin	\$39.5	\$45.1	\$44.4	\$15.9	\$16.1	\$19.0	\$9.3	\$14.9	\$14.9	\$14.2	\$14.0	\$10.5
Financial Management Systems	\$25.2	\$30.5	\$27.7	\$4.6	\$5.5	\$6.4	\$8.1	\$13.9	\$13.9	\$12.6	\$11.1	\$7.5

Limitation on Administrative Expenses

Human Resources Support Systems	\$11.7	\$13.2	\$14.9	\$9.1	\$9.4	\$10.9	\$0.9	\$1.0	\$1.0	\$1.6	\$2.9	\$3.1
Office of General Counsel (OGC) Product	\$2.6	\$1.3	\$1.8	\$2.2	\$1.3	\$1.8	\$0.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Mission Support Services	\$40.9	\$46.8	\$46.3	\$15.9	\$16.1	\$19.0	\$9.0	\$14.9	\$14.9	\$16.0	\$15.8	\$12.4
E-Gov	\$1.8	\$1.7	\$0.9	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1.8	\$1.7	\$0.9
Benefits.gov	\$0.3	\$0.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.3	\$0.4	\$0.0
Budget Formulation and Execution Line of Business (LoB)	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1
Disaster Assistance Improvement Plan	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1
E-Rulemaking	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1
Federal Audit Clearinghouse	\$0.0	\$0.01	\$0.01	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.01	\$0.01
Federal PKI Bridge	\$0.2	\$0.3	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.3	\$0.3
Financial Management LoB	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1
Freedom of Information Act Portal	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Geospatial LoB	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Grants.gov	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Human Resources LoB	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1
Integrated Award Environment	\$0.7	\$0.7	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.7	\$0.7	\$0.1
Performance Management LoB	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1

Limitation on Administrative Expenses

IT Infrastructure, IT Security, and IT Management	\$1,778.0	\$1,803.7	\$2,028.3	\$437.6	\$467.0	\$513.5	\$221.1	\$248.4	\$247.9	\$1,119.3	\$1,088.3	\$1,266.9
Cybersecurity	\$215.8	\$225.7	\$262.1	\$72.4	\$76.2	\$83.4	\$34.7	\$44.9	\$47.5	\$108.7	\$104.6	\$131.2
IT Security & Compliance	\$215.8	\$225.7	\$262.1	\$72.4	\$76.2	\$83.4	\$34.7	\$44.9	\$47.5	\$108.7	\$104.6	\$131.2

Limitation on Administrative Expenses

Table 3.27—FY 2025 Agency IT Portfolio Summary (Costs in Millions)

FY 2025 Agency IT Portfolio Summary Costs in Millions*	Total Cost			Internal Labor			External Labor			ITS Funds		
	FY 2023	FY 2024	FY 2025	FY 2023	FY 2024	FY 2025	FY 2023	FY 2024	FY 2025	FY 2023	FY 2024	FY 2025
Infrastructure	\$1,384.4	\$1,385.4	\$1,564.5	\$230.8	\$246.4	\$272.0	\$155.8	\$171.5	\$176.9	\$997.8	\$967.4	\$1,115.7
Application	\$121.9	\$132.6	\$145.0	\$43.7	\$48.7	\$51.5	\$67.9	\$72.6	\$80.7	\$10.3	\$11.2	\$12.8
Data Center and Cloud	\$594.0	\$606.6	\$717.0	\$75.8	\$82.9	\$89.7	\$49.0	\$53.7	\$55.7	\$469.2	\$470.1	\$571.6
End User	\$205.0	\$277.0	\$244.1	\$62.4	\$64.2	\$73.9	\$18.7	\$22.9	\$19.2	\$123.9	\$189.9	\$151.0
Network	\$442.7	\$340.0	\$429.6	\$43.1	\$44.4	\$49.9	\$13.6	\$14.8	\$13.9	\$386.0	\$280.7	\$365.8
Output	\$6.2	\$5.8	\$5.9	\$2.3	\$2.2	\$2.3	\$1.2	\$1.4	\$1.3	\$2.7	\$2.3	\$2.2
Platform	\$14.6	\$23.4	\$23.0	\$3.6	\$4.0	\$4.6	\$5.4	\$6.1	\$6.0	\$5.6	\$13.3	\$12.3
IT Governance & Other Support	\$177.8	\$192.5	\$201.8	\$134.5	\$144.3	\$158.2	\$30.5	\$32.0	\$23.6	\$12.8	\$16.3	\$20.0
Agency Communications	\$10.5	\$9.1	\$7.3	\$4.0	\$6.2	\$6.0	\$6.5	\$3.0	\$1.3	\$0.0	\$0.0	\$0.0
Data Exchange Product	\$2.3	\$0.0	\$0.0	\$2.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Data Exchange Support Systems	\$4.7	\$4.6	\$4.8	\$4.3	\$4.2	\$4.7	\$0.3	\$0.4	\$0.0	\$0.0	\$0.0	\$0.0
Delivery	\$23.8	\$26.9	\$28.0	\$14.1	\$13.0	\$14.8	\$6.0	\$8.7	\$7.0	\$3.8	\$5.2	\$6.1
Electronic Records Management Product	\$0.5	\$0.4	\$0.4	\$0.4	\$0.4	\$0.4	\$0.1	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1
IT Management	\$125.1	\$138.2	\$149.9	\$107.2	\$117.5	\$129.1	\$12.4	\$15.0	\$12.0	\$5.5	\$5.6	\$8.8
Reimbursable Services	\$10.9	\$13.3	\$11.5	\$2.2	\$3.1	\$3.2	\$5.2	\$4.8	\$3.3	\$3.5	\$5.4	\$5.0

Note: Total may not add due to rounding

Table 3.28—Appendix B: Total Agency Cybersecurity Spend FY 2025 President's Budget

Total Agency Cybersecurity Spend FY 2025 President's Budget Cost in Millions	NIST Function¹	FY 2023	FY 2024	FY 2025
All Programmatic Areas		\$285.8	\$297.4	\$341.5
	Detect	\$28.0	\$30.9	\$41.3
	Identify	\$61.4	\$68.9	\$87.6
	Protect	\$175.5	\$168.3	\$184.3
	Recover	\$9.0	\$16.4	\$10.1
	Respond	\$11.9	\$13.0	\$18.2
Admin		\$3.1	\$3.9	\$3.9
	Identify	\$3.1	\$3.9	\$3.9
Cybersecurity		\$207.7	\$226.1	\$261.6
	Detect	\$17.1	\$20.1	\$29.0
	Identify	\$36.3	\$42.1	\$59.6
	Protect	\$140.8	\$141.2	\$151.3
	Recover	\$2.0	\$10.2	\$4.0
	Respond	\$11.6	\$12.6	\$17.7
Data and Business Intelligence		\$1.3	\$1.5	\$1.5
	Detect	\$0.0	\$0.0	\$0.0
	Recover	\$1.3	\$1.5	\$1.5
E-Gov		\$0.3	\$0.3	\$0.3
	Protect	\$0.2	\$0.3	\$0.3
	Recover	\$0.1	\$0.1	\$0.1
Infrastructure		\$71.7	\$63.6	\$71.8
	Detect	\$10.9	\$10.8	\$12.3
	Identify	\$22.0	\$22.8	\$24.1
	Protect	\$32.8	\$25.9	\$31.4
	Recover	\$5.6	\$3.6	\$3.6
	Respond	\$0.4	\$0.4	\$0.4
IT Governance & Other Support		\$1.3	\$1.6	\$2.1
	Protect	\$1.3	\$0.6	\$1.1
	Recover	\$0.0	\$1.0	\$1.0
Program Integrity		\$0.3	\$0.3	\$0.2
	Protect	\$0.3	\$0.3	\$0.2

¹ Please refer to the NIST framework for more details [Framework Documents | NIST](#)

Limitation on Administrative Expenses

Table 3.29— Total Agency Cybersecurity Spend (Non-IT Cost)

Total Agency Cybersecurity Spend (Non-IT Cost) FY 2025 President's Budget Cost in Millions	NIST Function	FY 2023	FY 2024	FY 2025
Non-IT Cost		\$14.8	\$16.6	\$19.6
Credentialing and Access Management	Protect	\$13.0	\$14.0	\$16.5
Insider Threat	Protect	\$0.3	\$0.3	\$0.3
OIG -- Respond - Prosecution and Investigation of Cyber Intrusions	Respond	\$1.6	\$2.4	\$2.8

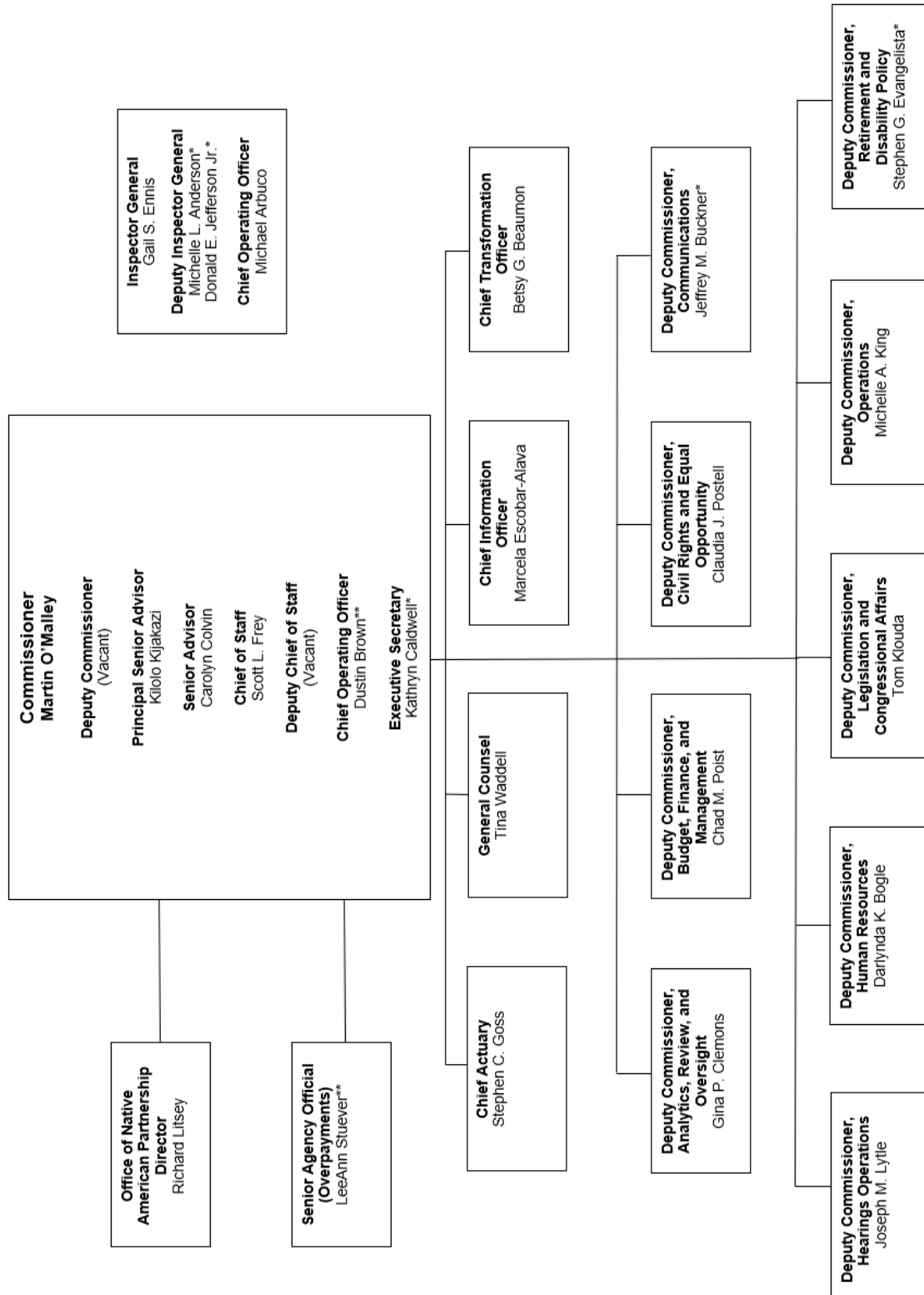
Table 3.30—Total Agency Cyber Human Capital Spend

Total Agency Cyber Human Capital Spend FY 2025 President's Budget Cost in Millions	FY 2023	FY 2024	FY 2025
Human Capital	\$0.3	\$0.3	\$0.3

Table 3.31—Total Agency Cybersecurity Spend

Total Agency Cybersecurity Spend FY 2025 President's Budget Cost in Millions	FY 2023 Total (Actuals)	FY 2024 Total	FY 2025 Total
All Programmatic Areas	\$285.8	\$297.4	\$341.5
Non-IT Cost	\$14.8	\$16.6	\$19.6
Human Capital - Cyber Human Capital	\$0.3	\$0.3	\$0.3
Total	\$300.9	\$314.3	\$361.4

SSA ORGANIZATIONAL CHART



For the full agency organization chart, please visit <https://www.ssa.gov/org/ssachart.pdf>

*Acting
**Detail In

Limitation on Administrative Expenses

MAJOR BUILDING RENOVATIONS AND REPAIR COSTS

We have maintained a record of accomplishment in real property efficiency. We continue to achieve the goals set forth initially by our Reduce the Footprint standards and continued in our Real Property Capital Planning efforts. Our major building costs are associated with our ongoing efforts to make the most efficient use of our space and reduce our reliance on leased space where it makes business sense.

This exhibit describes our fiscal year (FY) 2025 major building costs and provides an update on our on-going major building renovations and repairs funded in previous years.

FY 2025 Major Building Renovation Costs

We conduct frequent evaluations of our business processes to ensure our occupied space aligns with our business needs and with the future of work. In conjunction with evaluating our long-term space needs, we have identified several opportunities over the next several years to reduce space at some of our non-public facing locations. These opportunities correspond to upcoming lease actions or support General Services Administration (GSA) priorities.

Update of Ongoing Projects (Funded in Prior Years)

- **Frank Hagel Federal Building (FHFB):** We evaluated our occupancy of the FHFB in Richmond, California, including the significant investments required to keep the space we occupied efficient and functional, and confirmed that the FHFB had too much space for our needs. We worked with GSA to identify alternative, cost-effective space to relocate our employees from the FHFB. Beginning in May 2023 we communicated our plan to vacate with affected Congressional offices and agency employees, and our union partners. We relocated our Richmond Teleservice Center (TSC) employees from FHFB to leased space for our Bay Area TSC on Franklin Street in Oakland, California. In doing so, we implemented space sharing to make most efficient use of the space and maintained the space as it was designed with no modifications. We are relocating our remaining FHFB employees to the Dellums Federal Building in Oakland, California, where we also already occupy space. To transition employees from FHFB to the Dellums Building, we must modify the space that we currently occupy and acquire some additional space. We are working with GSA to finalize the design for these modifications. Vacating FHFB will reduce our footprint by approximately 370,000 useable square feet (USF) and save the agency \$4.5 million in annual rent.
- **National Capital Region:** In January 2022, we collaborated with GSA to cancel our lease prospectus project at One Skyline Tower, and in January 2023, we issued notifications of our intent to vacate the leased location at the end of our lease (September 2024). We anticipate fully vacating as of March 31, 2024, at which time Skyline will be turned back to GSA. Upon lease expiration, we will reduce our footprint by approximately 280,000 USF and save the agency \$10 million in annual rent costs.

Limitation on Administrative Expenses

- **Seattle Columbia Center:** In December 2022, we reduced the Seattle Regional Office lease footprint from approximately 85,000 USF to 24,000 USF, saving approximately \$3.9 million in annual rent costs. In collaboration with GSA, we identified replacement Federal space totaling approximately 7,800 USF, which we anticipate will save an additional \$500,000 in annual rent costs. We are working with GSA to establish a cost estimate to renovate the Federal space and anticipate relocating in FY 2025. Upon completion, this project will reduce our footprint by approximately 77,200 USF and save the agency up to \$4.4 million in annual rent costs.
- **Supply Building:** The Supply Building is located on our headquarters campus in Woodlawn, Maryland. This project will modernize space originally designed as warehouse space to serve as office space. We completed the design for the project in December 2023, and we tentatively expect construction to be completed by June 2025. This project will enable us to vacate an outlying lease and save the agency approximately \$2.9 million in annual rent at lease expiration.
- **Auburn Teleservice Center:** GSA is disposing of the property located at 1901 C St. SW, Auburn, Washington, where one of our mega teleservice centers is located, along with a regional training center and interactive video training studio. These components currently occupy approximately 149,350 USF. However, we determined that we only need approximately 42,000 USF in a new lease, reducing our portfolio by approximately 105,000 USF. The disposition was part of the Federal Asset Sales and Transfer Act of 2016 process, and that the fit-out and move costs are borne by the Asset Proceeds and Space Management Fund via the General Services Administration at no cost to SSA. GSA awarded the replacement lease with a 20-year term, firm term 10 years at 1701 S Commons, Federal Way, Washington. We expect to relocate by the end of April 2024, a few months ahead of schedule.

Limitation on Administrative Expenses

Table 3.32—FY 2023 Physical Infrastructure Costs by Component
(Dollars in thousands)^{1,2}

Components	Rental Payments to GSA	Communications, Utilities & Misc. Charges	Operations & Maintenance of Facilities ³	Operations & Maintenance of Equipment	Total
LAE One Year					
Office of Operations	\$540,448	\$26,434	\$229,147	\$63	\$796,092
Office of the Chief Information Officer ⁴	\$0	\$0	\$0	\$0	\$0
Office of Hearings Operations	\$112,643	\$1,854	\$39,634	\$0	\$154,131
Office of Human Resources	\$0	\$42	\$165	\$5	\$212
Office of Retirement and Disability Policy	\$0	\$5	\$0	\$0	\$5
Office of Communication	\$0	\$0	\$2	\$0	\$2
Office of Civil Rights and Equal Opportunity	\$0	\$2	\$2	\$0	\$4
Office of Analytics, Review and Oversight	\$2,376	\$36	\$287	\$0	\$2,700
Office of Budget, Finance, and Management	\$0	\$134	\$3	\$0	\$137
DCBFM - Agency Level	\$74,064	\$182,446	\$143,892	\$230	\$400,632
Office of General Counsel	\$848	\$6	\$104	\$0	\$958
Disability Determination Services	\$0	\$27,608	\$247	\$0	\$27,854
Information Technology Systems	\$0	\$201,651	\$0	\$602,153	\$803,804
Social Security Advisory Board	\$262	\$7	\$38	\$18	\$325
Subtotal LAE One Year	\$730,641	\$440,224	\$413,520	\$602,469	\$2,186,855
LAE No Year					
Delegated Buildings	\$0	\$15,332	\$64,117	\$0	\$79,450
Information Technology Systems ⁵	\$0	\$0	\$0	\$133,247	\$133,247
Subtotal LAE No Year	\$0	\$15,332	\$64,117	\$133,247	\$212,697
LAE Multi Year					
Program Integrity	\$0	\$0	\$0	\$181,066	\$181,066
Subtotal LAE Multi Year	\$0	\$0	\$0	\$181,066	\$181,066
Grand Total	\$730,641	\$455,556	\$477,637	\$916,782	\$2,580,617

¹ Totals may not add due to rounding.

² Table does not include Technology Modernization Fund, Low-Income Subsidy activities, Postal Service Reform Act, or eCBSV.

³ Includes guard services.

⁴ The Office of the Chief Information Officer is a staff component that is responsible for the Information Management and Information Technology programs.

⁵ The ITS budget funds all information technology projects for the Agency.

Table 3.33—FY 2024 Estimated Physical Infrastructure Costs by Component
(Dollars in thousands) ^{1,2}

	Rental Payments to GSA	Communications, Utilities & Misc. Charges	Operations & Maintenance of Facilities ³	Operations & Maintenance of Equipment	Total
LAE One Year					
Office of Operations	\$549,657	\$29,007	\$208,050	\$65	\$786,779
Office of the Chief Information Officer ⁴	\$0	\$0	\$0	\$0	\$0
Office of Hearings Operations	\$114,562	\$2,034	\$35,985	\$0	\$152,581
Office of Human Resources	\$0	\$46	\$150	\$5	\$201
Office of Retirement and Disability Policy	\$0	\$5	\$0	\$0	\$5
Office of Communication	\$0	\$0	\$2	\$0	\$2
Office of Civil Rights and Equal Opportunity	\$0	\$2	\$2	\$0	\$4
Office of the Chief Actuary	\$0	\$0	\$0	\$0	\$0
Office of Legislative and Congressional Affairs	\$0	\$0	\$0	\$0	\$0
Office of Analytics, Review and Oversight	\$2,417	\$40	\$261	\$0	\$2,718
Office of Budget, Finance, and Management	\$0	\$147	\$2	\$0	\$150
DCBFM - Agency Level	\$75,326	\$200,202	\$130,644	\$237	\$406,409
Office of General Counsel	\$862	\$6	\$95	\$0	\$963
OGC - Agency Level	\$0	\$0	\$0	\$0	\$0
Office of the Commissioner	\$0	\$0	\$0	\$0	\$0
Disability Determination Services	\$0	\$30,295	\$224	\$0	\$30,519
Information Technology Systems	\$0	\$221,276	\$0	\$620,436	\$841,712
Social Security Advisory Board	\$279	\$8	\$34	\$19	\$340
Subtotal LAE One Year	\$743,104	\$483,069	\$375,449	\$620,762	\$2,222,382
LAE No Year					
Delegated Buildings	\$0	\$15,007	\$62,759	\$0	\$77,766
Information Technology Systems ⁵	\$0	\$339	\$0	\$167,097	\$167,436
Subtotal LAE No Year	\$0	\$15,347	\$62,759	\$167,097	\$245,203
LAE Multi Year					
Program Integrity	\$0	\$0	\$0	\$187,866	\$187,866
Subtotal LAE Multi Year	\$0	\$0	\$0	\$187,866	\$187,866
Grand Total	\$743,104	\$498,416	\$438,208	\$975,725	\$2,655,453

¹ Totals may not add due to rounding.

² Table does not include Technology Modernization Fund, Low-Income Subsidy activities, Postal Service Reform Act, or eCBSV.

³ Includes guard services.

⁴ The Office of the Chief Information Officer is a staff component that is responsible for the Information Management and Information Technology programs.

⁵ The ITS budget funds all information technology projects for the Agency.

Limitation on Administrative Expenses

Table 3.34—FY 2025 Estimated Physical Infrastructure Costs by Component
(Dollars in thousands) ^{1,2}

	Rental Payments to GSA	Communications, Utilities & Misc. Charges	Operations & Maintenance of Facilities ³	Operations & Maintenance of Equipment	Total
LAE One Year					
Office of Operations	\$546,995	\$30,541	\$211,891	\$84	\$789,512
Office of the Chief Information Officer ⁴	\$0	\$0	\$0	\$0	\$0
Office of Hearings Operations	\$114,008	\$2,142	\$36,962	\$0	\$152,799
Office of Human Resources	\$0	\$48	\$153	\$7	\$208
Office of Retirement and Disability Policy	\$0	\$6	\$0	\$0	\$6
Office of Communication	\$0	\$0	\$2	\$0	\$2
Office of Civil Rights and Equal Opportunity	\$0	\$2	\$2	\$0	\$4
Office of the Chief Actuary	\$0	\$0	\$0	\$0	\$0
Office of Legislative and Congressional Affairs	\$0	\$0	\$0	\$0	\$0
Office of Analytics, Review and Oversight	\$2,405	\$42	\$265	\$0	\$2,713
Office of Budget, Finance, and Management	\$0	\$155	\$2	\$0	\$158
DCBFM - Agency Level	\$74,962	\$210,786	\$133,056	\$309	\$419,113
Office of General Counsel	\$858	\$7	\$96	\$0	\$961
OGC - Agency Level	\$0	\$0	\$0	\$0	\$0
Office of the Commissioner	\$0	\$0	\$0	\$0	\$0
Disability Determination Services	\$0	\$31,896	\$228	\$0	\$32,124
Information Technology Systems	\$0	\$232,974	\$0	\$807,698	\$1,040,673
Social Security Advisory Board	\$281	\$8	\$35	\$24	\$349
Subtotal LAE One Year	\$739,509	\$508,607	\$382,380	\$808,122	\$2,438,618
LAE No Year					
Delegated Buildings	\$0	\$16,328	\$68,283	\$0	\$84,611
Information Technology Systems ⁵	\$0	\$271	\$0	\$133,678	\$133,949
Subtotal LAE No Year	\$0	\$16,600	\$68,283	\$133,678	\$218,561
LAE Multi Year					
Program Integrity	\$0	\$0	\$0	\$193,143	\$193,143
Subtotal LAE Multi Year	\$0	\$0	\$0	\$193,143	\$218,143
Grand Total	\$739,509	\$525,206	\$450,663	\$1,134,944	\$2,850,322

¹ Totals may not add due to rounding.

² Table does not include Technology Modernization Fund, Low-Income Subsidy activities, Postal Service Reform Act, or eCBSV.

³ Includes guard services.

⁴ The Office of the Chief Information Officer is a staff component that is responsible for the Information Management and Information Technology programs.

⁵ The ITS budget funds all information technology projects for the Agency.

Table 3.35—FY 2023 Physical Infrastructure Costs by Region
(Dollars in thousands)¹

Regions	Rental Payments to GSA	Communications, Utilities & Misc. Charges	Operations & Maintenance of Facilities ²	Operations & Maintenance of Equipment	Total
Boston	\$27,700	\$1,566	\$12,531	\$3	\$41,799
New York	\$84,551	\$5,001	\$49,443	\$0	\$138,995
Philadelphia	\$60,496	\$4,161	\$42,652	\$45	\$107,355
Atlanta	\$132,017	\$12,452	\$45,787	\$2	\$190,259
Chicago	\$91,634	\$6,998	\$43,207	\$5	\$141,844
Dallas	\$68,218	\$3,644	\$26,778	\$1	\$98,642
Kansas City	\$29,819	\$1,949	\$15,332	\$0	\$47,101
Denver	\$16,109	\$914	\$8,488	\$8	\$25,520
San Francisco	\$110,379	\$6,528	\$47,110	\$1	\$164,018
Seattle	\$23,564	\$1,142	\$11,290	\$6	\$36,002
Headquarters³	\$86,154	\$411,200	\$175,018	\$933,008	\$1,605,380
Total	\$730,641	\$455,556	\$477,637	\$933,079	\$2,596,914

Table 3.36—FY 2024 Estimated Physical Infrastructure Costs by Region
(Dollars in thousands)¹

Regions	Rental Payments to GSA	Communications, Utilities & Misc. Charges	Operations & Maintenance of Facilities ²	Operations & Maintenance of Equipment	Total
Boston	\$28,172	\$1,714	\$11,496	\$3	\$41,385
New York	\$85,993	\$5,471	\$45,362	\$0	\$136,826
Philadelphia	\$61,528	\$4,553	\$39,131	\$47	\$105,259
Atlanta	\$134,268	\$13,624	\$42,007	\$2	\$189,902
Chicago	\$93,197	\$7,656	\$39,640	\$6	\$140,499
Dallas	\$69,382	\$3,987	\$24,567	\$1	\$97,938
Kansas City	\$30,328	\$2,133	\$14,066	\$0	\$46,527
Denver	\$16,384	\$1,000	\$7,788	\$8	\$25,180
San Francisco	\$112,262	\$7,143	\$43,221	\$1	\$162,626
Seattle	\$23,966	\$1,249	\$10,358	\$6	\$35,580
Headquarters³	\$87,624	\$449,886	\$160,569	\$975,650	\$1,673,729
Total	\$743,104	\$498,416	\$438,207	\$975,724	\$2,655,451

¹ Totals may not add due to rounding.

² Includes guard services.

³ Includes DDS, SSAB, ITS, Delegated Buildings, Program Integrity, and Low-Income Subsidy.

Limitation on Administrative Expenses

Table 3.37—FY 2025 Estimated Physical Infrastructure Costs by Region
(Dollars in thousands)¹

Regions	Rental Payments to GSA	Communications, Utilities & Misc. Charges	Operations & Maintenance of Facilities²	Operations & Maintenance of Equipment	Total
Boston	\$28,036	\$1,806	\$11,823	\$3	\$41,668
New York	\$85,577	\$5,765	\$46,651	\$0	\$137,993
Philadelphia	\$61,230	\$4,797	\$40,244	\$55	\$106,326
Atlanta	\$133,619	\$14,356	\$43,202	\$3	\$191,179
Chicago	\$92,746	\$8,068	\$40,767	\$6	\$141,588
Dallas	\$69,046	\$4,201	\$25,266	\$1	\$98,515
Kansas City	\$30,181	\$2,248	\$14,466	\$0	\$46,895
Denver	\$16,305	\$1,054	\$8,009	\$10	\$25,377
San Francisco	\$111,719	\$7,527	\$44,449	\$1	\$163,696
Seattle	\$23,850	\$1,317	\$10,653	\$7	\$35,826
Headquarters³	\$87,200	\$474,068	\$165,134	\$1,134,857	\$1,861,259
Total	\$739,509	\$525,206	\$450,663	\$1,134,944	\$2,850,322

¹ Totals may not add due to rounding.

² Includes guard services.

³ Includes DDS, SSAB, ITS, Delegated Buildings, Program Integrity, and Low-Income Subsidy.

SOCIAL SECURITY ADVISORY BOARD

This Budget includes \$3.150 million for the Social Security Advisory Board (SSAB) in FY 2025. Additionally, the Budget proposes to extend SSA's no-year Information Technology (IT) balance authority to include the use of unobligated SSAB resources for SSAB IT efforts.

Board Creation and Functions

The *Social Security Independence and Program Improvements Act of 1994* established a bipartisan, seven-member Board to advise the President, the Congress, and the Commissioner of Social Security on policies related to Social Security's Old-Age, Survivors, and Disability Insurance (OASDI) program, and the Supplemental Security Income (SSI) program.

According to the statute, the specific functions of the Board include: (1) analyzing the Nation's retirement and disability systems and making recommendations with respect to how the OASDI program and the SSI program, supported by other public and private systems, can most effectively assure economic security; (2) studying and making recommendations relating to the coordination of programs that provide health security with programs described in the first paragraph; (3) making recommendations to the President and to the Congress with respect to policies that will ensure the solvency of the OASDI program, both in the short-term and the long-term; (4) making recommendations with respect to the quality of service that the Administration provides to the public; (5) making recommendations with respect to policies and regulations regarding the OASDI and the SSI programs; (6) increasing public understanding of the social security system; (7) making recommendations with respect to a long-range research and program evaluation plan for the Administration; (8) reviewing and assessing any major studies of social security as may come to the attention of the Board; and (9) making recommendations with respect to such other matters as the Board determines to be appropriate.

Board Members

Board members are chosen on the basis of their integrity, impartiality, and good judgment, and are, by reason of their education, experience, and attainments, exceptionally qualified to perform Board duties.¹ Board members are Special Government Employees who work intermittently and are compensated at the daily rate of basic pay for level four of the Executive Schedule.

Board Meetings

Pursuant to its authorizing statute, the Board is required to meet at least four times per year. The Board exceeds that requirement, generally holding six, two-all-day bimonthly meetings and regularly scheduled conference calls.

For more detailed information about the Board, please see the Board's website at www.ssab.gov.

Explanation of Budget Request

The agency's budget for FY 2025 aims to support the Board's administrative and research activities necessary to address the statutory obligations of the Board. The requested increase will allow the Board to maintain its ambitious research plan, comply with inter-agency reporting

¹ 42 USC § 903 (C)(2)

Limitation on Administrative Expenses

requirements, enhance its communication and outreach efforts, integrate succession planning and training opportunities into its governance goals, and ensure the agency establishes internal controls and works towards meeting system security requirements. The Board is not requesting reception and representation authority in FY 2025.

Table 3.38—Obligations by Object Class and Staffing¹

Object Class	FY 2023 ² Actual	FY 2024 Estimate	FY 2025 Request
Personnel & Benefits	\$2,261,814	\$2,250,000	\$2,450,000
Travel	\$4,078	\$20,000	\$20,000
Rent & Telecommunications	\$269,006	\$285,000	\$300,000
Consultants, Contracts & Other Services	\$242,552	\$120,000	\$330,000 ³
Supplies & Equipment	\$29,250	\$25,000	\$50,000
Total, All Objects	\$2,806,700	\$2,700,000	\$3,150,000
Full-time, Permanent Staff	11 ⁴	11	11
Part-time, SGE's and Temp Staff	0	0	0
Board Members	4	7	7

Explanation of Requested Increase

Personnel and Travel

While SSAB has not increased the total number of staff, it recognizes that by 2025, approximately a third of SSAB senior staff will be eligible to retire. SSAB has begun developing a succession plan that includes professional development, job-specific training, and some short-term overlap hiring to ensure a smooth transition. SSAB has been unable to adopt its succession plans in FY 2023 or FY 2024 due to budget constraints but is hoping to institute succession planning in FY 2025. SSAB's travel estimates include transit benefits, and associated costs for Board members and invited guests to meet in person. The Board had one in-person site visit in FY 2023. Without either a budget increase, allowance for use of prior year funds for IT spending, or assistance from SSA on operational costs, SSAB will be unable to have any in-person meetings, site visits, or fully fund necessary systems costs year in FY 2024. The FY 2025 budget request will allow one in-person site visit to meet with an SSA regional office and SSA staff that work directly with the public. The site visits have been invaluable to the Board as they see the operationalization of policy and hear directly from staff about their experience in providing services to the public.

¹ Totals may not add due to rounding.

² The FY 2023 total is the total amounts obligated in FY 2023 per SSA's October 17, 2023; Financial Indicator Report (FIR), potential differences could appear in subsequent FIRs.

³ The increase from FY 2024 to FY 2025 assumes SSAB will not fund necessary system supports t under the 2024 continuing resolution level but will need to fund them in FY 2025.

⁴ For most of FY 2023 SSAB had 12 full time and 1 part time staff, but they left SSAB in August and September 2023 and are therefore not reflected in the staff total, under the 2024 continuing resolution level SSAB is currently under a hiring freeze and unable to hire the two research positions and the open administrative assistant position.

Limitation on Administrative Expenses

Real Property

SSA renewed the lease for SSAB's office space in 2017. SSA has the option of leaving the space in 2027. SSAB will continue to monitor the success of telework and has discussed reducing the agency's real estate footprint with SSA and the General Services Administration. Cost projections reflect current lease arrangements including increased rental costs, cost increases for Federal Protective Services charges, and enhancements to the office internet and Audio-Visual systems.

Consultants and Contracts

With level funding in FY 2024, SSAB cannot support critical system supports. The FY 2025 increase in this category assumes support for IT infrastructure; the continued use of cloud.gov to host the SSAB website; Interagency Agreements to cover other government-required services; and projected security costs for physical space.

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