Social Security Administration

Justification of Estimates for Appropriations Committees for Fiscal Year 2026

Securing today
and tomorrow

FY 2026 Congressional Justification

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Securing today
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Message From The Commissioner

It is my honor to serve as the Commissioner of the Social Security Administration. With our fiscal year (FY) 2026 President's Budget request of $14.793 billion, we will focus on delivering timely, effective services to the millions of people who depend on us. The public deserves the highest level of customer service from their government—especially from our agency, which interacts with customers more than 500 million times through field office visits, calls, and online services annually.

We are steadfast at delivering the Administration's goal of creating a lean, accountable, and efficient Federal agency that works for the public. We are committed to being responsible stewards of taxpayer dollars and finding ways to work better and smarter. Consistent with Executive Orders issued by the White House, we have taken steps to implement efficiencies and reduce costs with a renewed focus on our mission-critical work. Recognizing our important mission and its impact on the public, we will work to improve customer service, increase employee productivity, fight fraud and waste, and optimize and empower our workforce.

We recognize that customer wait times are far too long for critical services. We are working to address the issues. In FY 2026, the President's Budget will support achieving a minimum 12-minute average speed of answer on our National 800 Number—a 40 percent improvement from current levels of around 20 minutes. We will also reduce the wait time for an initial disability claim to 190 days in the fourth quarter, down from over 230 days currently. To make doing business with us easier, we will continue to expand and improve our online services and simplify our business processes by streamlining and eliminating inefficiencies.

Our continuing priority is paying the right people the right amount at the right time. We will strengthen Americans' trust in our programs by fighting fraud and waste. To support our anti-fraud efforts, we will increase our corps of Special Assistant United States Attorneys who prosecute fraud and continue improving identity-proofing controls across all service channels. In FY 2026, the President's Budget request will also increase our cost-effective program integrity work to support trust fund and program stewardship. The 2026 program integrity funding will put us on the path to eliminate the continuing disability reviews (CDR) backlog in future years.

We are reshaping our organization to focus on mission-critical priorities, including restructuring our workforce to increase staff for our frontline operations, consolidating functions across offices, and streamlining our headquarters and regional structures. Through voluntary reassignments, we transitioned about 2,000 highly qualified professionals into direct-service positions and are giving them the proper training and tools to serve our customers. In FY 2026, we will continue to increase employee productivity through more efficient business processes, workload automation, information technology improvements, and accelerated artificial intelligence (AI) investments. These changes will allow us to serve the public more effectively and efficiently—whether in-person, over the phone, or online.

With our FY 2026 President's Budget request, we will improve our vital services for millions of Americans and remain responsible stewards of taxpayer dollars.

Respectfully,

Frank J. Bisignano
Commissioner

Baltimore, Maryland
May 30, 2025

Social Security Administration Overview

Our budget request will allow us to protect Social Security and fund the administrative expenses for our three major programs: Old-Age and Survivors Insurance (OASI), Disability Insurance (DI), and Supplemental Security Income (SSI), in addition to other administrative expenses (see Figures 1 and 2). The Social Security Administration (SSA) also supports programs administered by other Federal and State agencies, as required by law. In fiscal year (FY) 2026, we will pay approximately $1.7 trillion directly to our beneficiaries; our administrative costs are less than **1 percent** of the benefits we pay.

Figure 1: Benefit Payments and Beneficiaries by Program, FYs 2024–2026

Benefits *(Outlays in Billions)*	**FY 2024 Actual**	**FY 2025 Estimate**	**FY 2026 Estimate**	**FY 2025 to FY 2026 Change**
Trust Fund Programs[1]				
OASI	$1,293.7	$1,404.2	$1,478.0	5.3%
DI	$153.7	$163.9	$173.6	5.9%
Subtotal, OASDI	$1,447.5	$1,568.1	$1,651.6	5.3%
General Fund Program[2]				
SSI – Federal *(Note: There are 11 monthly benefit payments in FY 2024 and 12 in FY 2025 and FY 2026)*	$57.6	$64.1	$66.8	4.2%
State-Funded Program				
SSI State Supplementary Benefits	$3.1	$3.4	$3.5	2.8%
Total	$1,508.2	$1,635.6	$1,721.8	5.3%
Beneficiaries *(in Millions)*	**FY 2024 Actual**	**FY 2025 Estimate**	**FY 2026 Estimate**	**FY 2025 to FY 2026 Change**
Trust Fund Programs[3]				
OASI	59.0	60.8	62.3	2.4%
DI	8.4	8.4	8.5	1.8%
Subtotal, OASDI	67.4	69.2	70.8	2.3%
General Fund Program[4]				
SSI Federal Recipients	7.3	7.3	7.3	0.9%
State-Funded Program				
SSI State Supplementary Recipients *(no Federal SSI payment)*	0.1	0.1	0.1	2.2%
Total ***(includes about 2.5 million SSI/OASDI concurrent recipients)***	74.9	76.6	78.3	2.2%

[1] OASI increases are primarily due to Cost-of-Living Adjustments (COLA) and increases in the average number of beneficiaries. FY 2025 also includes the effect of the Social Security Fairness Act on benefits paid to those who also receive pensions from work not covered by Social Security. Increases for DI are primarily due to COLAs, and from higher retroactive benefits paid as DI worker awards are expected to increase from recent low levels as we are working to resolve the backlog.

[2] Increases in SSI outlays are due to the effects of COLAs and changes in average payments to certain recipients following the assumed implementation of In-Kind Support and Maintenance-related regulations beginning in FY 2025.

[3] Increases for OASI are primarily due to increases in the number of individuals becoming newly entitled to OASI benefits, attributable to the baby boom generation's increasing attainment of retirement eligibility. In FY 2026, we expect DI worker applications and awards to begin to increase from recent low levels and DI beneficiaries begin to increase again.

[4] The decade-long declining trend in SSI applications and awards has begun to slow down and even reverse recently. As we expect DDS processing times to improve, this will lead to an increase in the number of SSI recipients in the coming years.

Our FY 2026 President's Budget request is $14.793 billion. This funding level will allow us to strengthen Social Security programs by investing in our core responsibilities to improve customer service, fight fraud and waste, increase payment integrity, and optimize and empower our workforce to focus on direct service. The requested level of funding will improve access to Social Security services, increase the accuracy of our determinations, and preserve the integrity of the benefits payments we issue. We will reduce wait times, expand and improve online services, and simplify our programs to make doing business with us easier. We will reduce the average wait time for an initial disability determination to 190 days in the fourth quarter of FY 2026—down from over 230 days currently. In addition, we plan to achieve at least a 12-minute average speed of answer on our National 800 Number—a 40 percent improvement from current levels of around 20 minutes. We will also increase our cost-effective program integrity work to process 200,000 more continuing disability reviews (CDR) and about 120,000 more SSI non-medical redeterminations than in FY 2025.

The Budget will also support an increase of about $600 million for our Information Technology Services (ITS), allowing us to undertake a significant investment in information technology (IT) to improve customer experience and provide better service. We will focus our IT efforts on four key areas: optimizing the catalog for online and mobile services, simplifying customer interactions, resolving customer needs on the first contact, and transforming foundational technologies. Key projects in each of these four focus areas include: providing enterprise scheduling for all customers, making *my* Social Security available on a mobile platform, providing electronic remittance payment options on all debt notices, automating medical evidence records requests, enhancing 800 Number interactive voice recognition with additional AI features, and improving and integrating identity assurance across channels. We are also continuing to work to transition away from our legacy IT systems and outdated processes.

Figure 2: Benefits and Administrative Budget by Program

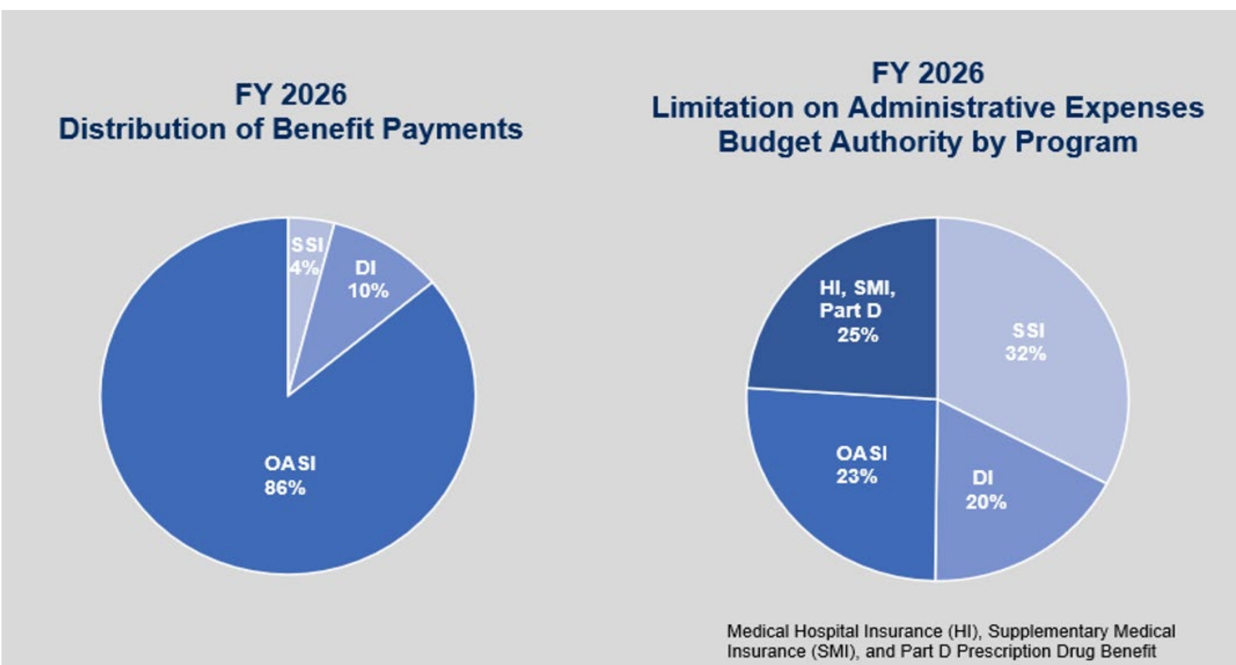

Figure 3: LAE Budget by Major Funding Category, FY 2026 Estimates

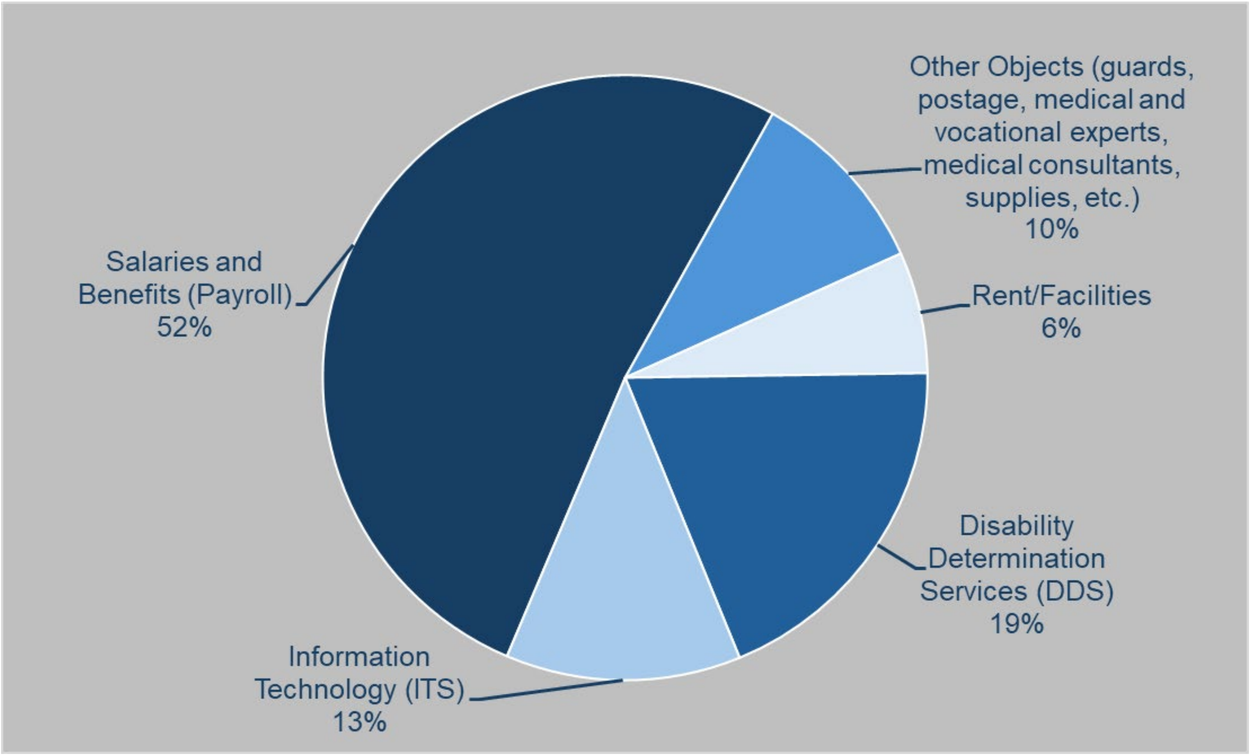

Figure 4: Funding and Staffing Table

Figure 4 displays actual and budgeted funding and workyears (WY). A 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.

Budget Authority and Workyears (WYs)[5]	FY 2024 Actual	FY 2025 Enacted	FY 2026 President's Budget	FY 2025 to FY 2026 Change
Budget Authority, One-Year (in Millions)				
Limitation on Administrative Expenses (LAE)[6]	$14,227	$14,299	$14,793	$494
(Dedicated Program Integrity (PI) Level, Base and Adjustment, included in LAE)[7,8]	*($1,851)*	*($1,903)*	*($2,397)*	*($494)*
Payroll	*8,201*	*8,019*	*7,652*	*-$367*
Other Objects	*2,279*	*2,357*	*2,461*	*$104*
Disability Determination Services (DDS)	*2,631*	*2,654*	*2,820*	*$166*
Information Technology (ITS)	*1,116*	*1,269*	*1,860*	*$591*
Research and Demonstration[9,10]	$91	$91	$91	$0
Office of the Inspector General (OIG)[11,12]	$115	$115	$115	$0
Total, Budget Authority	**$14,433**	**$14,505**	**$14,999**	**$494**
SSA WYs				
Full-Time Equivalents	57,998	53,851	50,278	-3,573
Overtime	2,154	1,668	1,700	32
Lump Sum Leave	153	375	284	-91
Total SSA WY	**60,305**	**55,894**	**52,262**	**-3,632**

[5] 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. Full-time equivalents include those funded by the Cooperative Disability Investigations (CDI) unit PI transfer from the LAE account to the OIG.

[6] LAE funding includes up to $150 million in FY 2024, up to $170 million in FY 2025, and up to $170 million in FY 2026 for SSI user fees. LAE funding also includes $1 million in Social Security Protection Act (SSPA) user fees.

[7] P.L. 118-47 – The Further Consolidated Appropriations Act, 2024 includes 18-month authority to obligate PI funds through March 31, 2025. P.L 119-4 – The Full-Year Continuing Appropriations and Extensions Act, 2025 includes 18-month authority to obligate PI funds through March 31, 2026. The FY 2026 Budget assumes appropriations language for FY 2026 will provide for similar 18-month authority to obligate PI funds.

[8] P.L. 118-47 and P.L. 119-4 allows SSA to transfer $15.1 million in FY 2024 and FY 2025 from the LAE account to the OIG for the costs associated with jointly operated CDI units. The President's Budget assumes a $24.6 million transfer.

[9] These amounts include $7 million in base research funding classified as mandatory.

[10] Congress appropriated $91 million in 3-year authority in both FY 2024 and FY 2025 for research and demonstration projects. The FY 2026 President's Budget proposes $91 million in FY 2026 (available through September 30, 2028) for research and demonstration projects.

[11] OIG funds do not include transfers from the SSA LAE account, Dedicated Program Integrity, to the OIG for the costs associated with jointly operated CDI units.

[12] P.L. 118-47, The Further Consolidated Appropriations Act, 2024, and P.L. 119-4, The Full-Year Continuing Appropriations and Extension Act, 2025, OIG totals include $2,000,000, which 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. The FY 2026 Budget assumes the OIG totals include $2,000,000 for similar no-year authority to obligate funds for information technology modernization.

Disability Determination Services (DDS)	13,643	13,094	13,094	0
Total SSA/DDS WY	**73,948**	**68,988**	**65,356**	**-3,632**
OIG	512	488	476	-12
Total SSA/DDS/OIG WY	**74,460**	**69,476**	**65,832**	**-3,644**

Budget Highlights

We have a proud tradition of service to the American people for nearly 90 years and have provided trillions of dollars in benefit payments to taxpayers. However, our current level of service has fallen short, and past efforts to transform service delivery have not met our beneficiaries' or taxpayers' expectations. In alignment with the President's Executive Orders and Office of Management and Budget guidance, we are finding ways to work better and smarter. We have a renewed focus on frontline service and remain committed to making further improvements for all Americans to access their benefits in person, over the phone, and online.

Our goals for FY 2026 are clear: with the public at the heart of all we do, we will improve customer service, fight fraud and waste to protect taxpayer dollars, and optimize and empower our workforce. We look forward to working with Congress on these and other important initiatives.

Improve Customer Service

We are taking decisive steps to improve service. To focus on direct service, we are consolidating our support functions performed by headquarters and regional staff, while increasing the number of employees in frontline service delivery positions. We are also boldly selecting and prioritizing development for future service delivery options and moving away from legacy IT systems.

Service Delivery Transformation

With this Budget, we will rapidly transform our service delivery model to improve customer service across all channels. To make doing business with us easier, we will expand and improve our online services, modernize our communications platform for customers, and administratively simplify our business processes. We will shift from localized workloads to portable, national workloads and eliminate inefficiencies in our business processes. We are aligning the workforce to increase first-contact resolution. In addition, we will implement robust workload monitoring tools, utilize Field Office Support Units to reduce backlogs and meet national workload needs, and implement enterprise prioritization to distribute claims and other workloads.

The President's FY 2026 Budget is critical to allowing us to deliver the level of service the public expects and deserves. With this budget level, we can deliver results that will positively impact our customers' lives and meet taxpayers' expectations. The changes underway at SSA will improve service to the American public and increase efficiency.

Customer Experience

We are a customer-focused organization committed to streamlining our customers' experience by enhancing service delivery and building digital capacity. Our IT enhancements focus on improving our direct service by increasing efficiency, making more services available online, and transitioning away from legacy systems. We are monitoring customer satisfaction and trust scores of our three high-impact priority service designations for the following online services: applying for adult disability benefits, applying for Social Security retirement benefits, and applying for a replacement Social Security Number Card. Our data collection and analysis will guide technological investments aimed at providing convenient, user-friendly, and secure online and digital options for customers doing business with us.

Telephone Services

Customers rely on receiving service by phone through our National 800 Number and by calling field offices directly. Millions of customers contact us through our National 800 Number, but the wait to speak to an agent remains too long, particularly during peak call periods. In FY 2025, we are on pace to handle about 35 million calls on our National 800 Number. Through April 2025, customers waited an average of 20 minutes to select a self-service option or to be connected to an agent. This does not include the time customers wait for a callback. Our FY 2026 funding request allows us to invest in modern technology to provide callers more digital and automated options for handling their inquiries when they contact us. The Budget also provides funding that will ensure we are staffed to deliver service to our callers, including replacing losses in our teleservice centers. These changes will result in at least a 12-minute average speed of answer on our National 800 Number in FY 2026—a 40 percent improvement from current levels of around 20 minutes.

In FY 2025, we began to expand use of our new telecommunication platform to our field offices. We will roll out this platform to our processing centers, State DDS, and hearings offices in FY 2026. Once fully implemented, we will provide more self-service options for our customers, including AI-enabled enhancements. We will optimize use of customer-centric features on our telecommunication platform, such as Call Back Assist and Estimated Wait Time, to ensure we are addressing customer needs faster.

Initial Disability Claims

Currently, the average wait time for an initial disability decision is nearly 8 months and an additional 8 months for a reconsideration, compared to about 4 months at each step in FY 2019. In FYs 2024 and 2025, we improved our systems and implemented process and policy changes, which resulted in increased productivity. Overall DDS productivity is up 20 percent through mid-May 2025 compared to October 2023, when productivity was the lowest last fiscal year. Assuming the same staffing level, this increased productivity equates to processing hundreds of thousands of additional cases in FY 2025 without a workyear increase. As of the week ending May 23, 2025, we have reduced the disability claims backlog for 49 consecutive weeks. We are on track to complete over 2.3 million initial disability decisions this year.

The Budget will allow us to reduce the disability claims backlog by providing additional staff and improving technology. It will also allow us to create and align new centralized Federal disability processing units and disability processing branches, staffed with reassigned employees, to assist States with the largest backlogs and wait times. These efforts will help us focus on this high-priority work and address inconsistencies among the States. We expect to improve the wait time for a disability decision from over 230 days currently to 190 days in the fourth quarter of FY 2026.

Fight Fraud and Waste

Our request helps ensure individuals receive the benefits to which they are entitled and safeguards the integrity of benefit programs by confirming eligibility, improving payment accuracy for both overpayments and underpayments, and preventing fraud. We must safeguard Americans' earned benefits—ensuring that we pay benefits only to those who are eligible. We will continue to protect beneficiaries, be a responsible steward of taxpayer resources, and strengthen Americans' trust in our programs by fighting fraud and waste. We will improve payment accuracy and prevent improper payments through enhanced technology, data analysis, and fraud-prevention tools. Our goal is to ensure we are paying the correct amount to the right person at the right time.

The Budget **requests $2.397 billion for dedicated program integrity funding, including $2.124 billion in an adjustment.** With this funding, we will increase our cost-effective program integrity work to support trust fund and program stewardship. Specifically, we will process 2.6 million SSI redeterminations and 600,000 medical CDRs in FY 2026. The Budget will also put us on the path to eliminate the CDR backlog in future years.

The Budget also supports our anti-fraud cooperative disability investigations (CDI) program. In addition, it supports an expansion of our Special Assistant United States Attorney (SAUSA) fraud prosecution program to at least 50 offices, consistent with the White House memorandum, Preventing Illegal Aliens from Obtaining Social Security Act Benefits. We will also work with the Office of the Inspector General (OIG) to issue civil monetary penalties, as authorized in statute.

When an overpayment occurs, we are required by law to seek repayment. In FY 2025, we increased the default overpayment withholding rate for Social Security beneficiaries from 10 percent of a person's monthly benefit to 50 percent, resulting in an increase in overpayment recoveries. In addition, we resumed our use of the Treasury Offset Program (TOP). Starting in March 2025, people with delinquent SSA debts who received pre-offset notifications before March 2020 may have their tax refunds or other Federal or State administrative payments offset to recover outstanding debts owed to the agency. As of May 26, 2025, we have recovered nearly $49 million in collections from TOP. We are also working to resume sending pre-offset notices and to refer approximately 500,000 debtors owing about $5 billion who became eligible after March 2020 to TOP.

As technology evolves and the use of AI becomes more sophisticated, we must also combat new and increasing fraud activities, such as direct deposit fraud. Cybersecurity will be at the forefront of our efforts to protect the sensitive information we maintain. By creating a centralized mission support component focused on finance, fraud, and program integrity, we are developing a more robust anti-fraud program. This program involves the maturation of many processes, including the Anti-Fraud Product Line (AFPL), which serves to deter, detect, mitigate, and refer suspected fraud to the agency's OIG. In FY 2026, we plan to sunset the majority of our maintenance-heavy legacy anti-fraud processes in AFPL and usher in new, more advanced processes to replace them. This includes more efficient ways to detect suspected fraud in customers' Direct Deposit transactions through continuing partnership with the U.S. Department of the Treasury on an in-line Account Verification Service, which checks customers' provided bank information against Treasury records to provide real-time feedback on transactions. In addition, we plan to release the first iteration of a new Fraud Risk Inventory Tool to replace current, manual processes and add in more advanced capabilities, such as web-based application, visual analytics, and AI technology where possible.

Optimize and Empower the Workforce

With a renewed focus on our mission-critical service for the American people, we returned employees to the office full time and began reshaping our organization in FY 2025 to increase accountability. With these changes, we are right-sizing essential services to our frontline workers to fulfill statutorily directed functions and complete integrity work to protect taxpayer dollars. We realigned our workforce through large-scale restructuring to increase staff in our direct-service operations, streamlined our headquarters and regional structures, and consolidated like functions across offices. We are placing highly qualified professionals in direct-service positions and providing them the necessary tools to serve the public effectively. Many of these employees have years of experience in different types of positions across the agency, making them a tremendous asset in direct-service positions. These efforts will increase the number of staff on the frontlines, despite an overall reduction in the SSA staff headcount.

In 2026, we plan to continue increasing employee productivity through more efficient business processes, automated workloads, IT improvements, and accelerated investment in AI. In FY 2025, we rolled out our Agency Support Companion, a generative AI chatbot designed to assist with content creation, content summarization, and research tasks. We look forward to building upon these efforts in FY 2026. We will add new employees to our core mission positions on the frontlines and maintain critical services for the public—particularly in hard-to-fill remote areas throughout the country. We will also improve productivity by identifying the most error-prone workloads and creating cohorts with special training to handle those workloads nationally.

FY 2026 Performance Table

Workload and Outcome Measures	FY 2024 Actual	FY 2025 Enacted[13]	FY 2026 President's Budget	Change FY 2025 to FY 2026	FY 2026 Goals
Retirement and Survivor Claims (includes Medicare)					
Retirement and Survivor Claims Completed (thousands)[14]	6,818	6,880	6,886	< 0.1%	Increase retirement claims processing.
Disability Claims					
Initial Disability Claims Receipts (thousands)	2,317	2,209	2,307	4.4%	Reduce disability claims pending and average processing time, despite increasing receipts.
Initial Disability Claims Completed (thousands)	2,229	2,349	2,322	-1.2%	
Initial Disability Claims Pending (thousands)	1,178	1,015	1,000	-1.5%	
Average Processing Time for Initial Disability Claims (days)[15]	231	225	220	-2.2%	
Disability Reconsiderations					
Disability Reconsiderations Receipts (thousands)	566	634	627	-1.1%	Increase reconsiderations completed by over 13 percent and reduce pending.
Disability Reconsiderations Completed (thousands)	514	570	649	13.9%	
Disability Reconsiderations Pending (thousands)	332	394	372	-5.6%	
Average Processing Time for Disability Reconsiderations (days)	231	248	248	0%	
Hearings					
Hearings Receipts (thousands)	363	400	478	19.5%	Increase hearings completions and reduce average processing time by 10 days.
Hearings Completed (thousands)	423	390	403	3.3%	
Hearings Pending (thousands)	262	272	347	27.6%	
Annual Average Processing Time for Hearings Decisions (days)	342	280	270	-3.6%	
National 800 Number					
National 800 Number Calls Handled (millions)[16]	32	35	35	0%	Reduce the average speed of answer by over 30 percent.
Average Speed of Answer (ASA) (minutes)[17]	28	18	12	-33.3%	
Agent Busy Rate (percent)	1%	9%	10%	11.1%	
Program Integrity					
Periodic Continuing Disability Reviews (CDRs) Completed (thousands)	1,342	1,200	1,400	16.7%	Increase medical continuing disability reviews by 50 percent.
Full Medical CDRs (included above, thousands)	381	400	600	50.0%	
SSI Non-Medical Redeterminations Completed (thousands)	2,550	2,482	2,600	4.8%	
Selected Other Agency Workload Measures					
Social Security Numbers (SSN) Completed (millions)	19	18	18	0%	Deliver essential social security number and earnings record updates.
Annual Earnings Items Completed (millions)	299	300	305	1.7%	
Social Security Statements Issued (millions)[18]	14	11	15	36.4%	
Selected Production Workload Measures					
Disability Determination Services Production per Workyear[19]	246	267	288	7.9%	Increase productivity through efficiencies.
Office of Hearings Operations Production per Workyear	76	83	87	4.8%	

[13] FY 2025 does not incorporate pending reassignments of support staff to mission-critical jobs.
[14] Includes Medicare.
[15] Average processing time for initial disability claims is an annual figure. In the fourth quarter of FY 2026, we estimate reducing the wait time for initial disability decisions to 190 days.
[16] Includes calls handled by automation. In FY 2024, we handled almost 3.7 million calls by automation. For FY 2025 and FY 2026, we project about 4 million automated calls handled in each year.
[17] We are currently developing an alternative performance measure to supplement ASA.
[18] The Social Security Statements Issued measure includes paper Statements only. It does not include electronic statements issued. In FY 2024, *my* Social Security users accessed their Social Security Statements 40 million times. Consistent with FYs 2024 and 2025, in FY 2026, 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 $12 million.
[19] DDS Production Per Workyear (PPWY) includes cases completed via Federal assistance.

FY 2026 President's Budget by Workload

SSA Workloads (in Millions)	FY 2025 Enacted	FY 2026 Estimate	FY 2025 to FY 2026 Change
Retirement and Survivors Claims Completed	$1,626	$1,634	$8
Initial Disability Claims Completed	$4,327	$4,429	$102
Reconsiderations Completed	$567	$635	$68
Hearings Completed	$2,417	$2,473	$56
Social Security Numbers	$665	$687	$22
CDRs and Redeterminations Completed	$1,875	$2,326	$451

Other Parts of Our Budget

In addition to our administrative funding, there are two other significant parts of the Budget:

- **Our funding request for research is $91 million, which is level with FY 2025.** The Budget will fund data development and dissemination, modeling efforts, administrative research, evaluations of agency programs and initiatives, and retirement and disability policy research to better serve the public. In addition, with this funding, we will conduct internal research on service delivery and program outcomes.

- **Our funding request for the Office of the Inspector General (OIG) is $114.7 million, the same level of funding as FY 2025.** This funding would allow the OIG to perform its core mission of auditing and investigating SSA programs and operations, while also building its data analytics capacity, increasing data-driven decision-making, investing in IT and automation tools, and building and strengthening its workforce. It also includes a transfer of $24.6 million from the program integrity adjustment to the OIG to support CDI units.

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SOCIAL SECURITY ADMINISTRATION

FY 2026 PRESIDENT'S BUDGET

Key Tables

Table i.1 - Summary Table of SSA's Appropriation Request

FY 2026	FTE	Amount
Payments to Social Security Trust Funds		$15,000,000
Supplemental Security Income (SSI) Program	-	
FY 2026 Request	-	$49,447,966,000[1]
FY 2027 First Quarter Advance	-	$23,500,000,000
Limitation on Administrative Expenses (LAE)	50,278[2]	$14,792,978,000[3]
Office of the Inspector General (OIG)	471[2,4]	$114,665,000

[1] Excludes $22,100,000,000 provided in the Full Year Continuing Appropriations and Extension Act, 2025 (P.L. 119-4) as a first quarter advance for FY 2026.
[2] FTEs include those funded from dedicated funding for program integrity and for reimbursable work.
[3] Includes up to $170,000,000 for SSI State Supplementary user fees and up to $1,000,000 for non-attorney user fees.
[4] Based on point-in-time estimates from April 2025.

Table i.2 – SSA Full Time Equivalents and Workyears

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate	Change FY 25/FY 26
SSA Full Time Equivalents	57,998	53,851	50,278	(3,573)
SSA Overtime/Lump Sum Leave	2,307	2,043	1,984	(59)
Subtotal, SSA Workyears[1,2]	**60,305**	**55,894**	**52,262**	**(3,632)**
Disability Determination Services (DDS) Workyears	13,643	13,094	13,094	0
Subtotal, SSA and DDS Workyears	**73,948**	**68,988**	**65,356**	**(3,632)**
OIG Full Time Equivalents	508	479	471[3]	(8)
OIG Overtime/Lump Sum Leave	4	9	5	(4)
Subtotal, OIG Workyears	**512**	**488**	**476**	**(12)**
TOTAL SSA/DDS/OIG WORKYEARS	**74,460**	**69,476**	**65,832**	**(3,644)**

[1] Workyears include those funded from dedicated funding to reduce the hearings backlog, dedicated funding for program integrity, Technology Modernization Fund (TMF), SCHIP, and LIS.
[2] Due to variations in the reporting of Full-Time Equivalents, the workyears included in this table will not match those included in the Budget Appendix.
[3] Based on point-in-time estimates from April 2025.

Table i.3 – SSA Outlays by Program[1]
(in millions)

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate	Change FY 25/FY 26
Trust Fund Programs				
Old-Age and Survivors Insurance (OASI)	$1,304,381	$1,414,394	$1,488,232	$73,838
Disability Insurance (DI)	$156,511	$166,813	$176,876	$10,063
Subtotal, Trust Fund Programs	**$1,460,892**	**$1,581,207**	**$1,665,108**	**$83,901**
General Fund Programs				
Supplemental Security Income (SSI)	$61,931	$68,955	$71,636	$2,681
Special Benefits for Certain World War II Veterans[2]	$0	$0	$0	$0
Subtotal, General Fund Programs	**$61,931**	**$68,955**	**$71,636**	**$2,681**
TOTAL SSA Outlays, Current Law	**$1,522,823**	**$1,650,162**	**$1,736,744**	**$86,582**
Percent change from FY 2025				5.25%

Table i.4 – Current Law – OASDI Outlays and Income
(in millions)

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate	Change FY 25/FY 26
Outlays				
OASI Benefits	$1,293,763	$1,404,173	$1,478,003	$73,830
DI Benefits	$153,722	$163,925	$173,575	$9,650
Other[3]	$13,407	$13,109	$13,530	$421
TOTAL OUTLAYS, Current Law	**$1,460,892**	**$1,581,207**	**$1,665,108**	**$83,901**
Income				
OASI	$1,212,911	$1,213,431	$1,298,786	$85,355
DI	$191,453	$193,099	$207,962	$14,863
TOTAL INCOME, Current Law	**$1,404,364**	**$1,406,530**	**$1,506,748**	**$100,218**

[1] Totals may not equal sums of component parts due to rounding.
[2] Totals are less than $500,000 for all years.
[3] "Other" includes SSA & non-SSA administration expenses, beneficiary services, payment to the Railroad Retirement Board, and in FY 2024, includes prior year Employment Tax refund.

Table i.5 – Current Law – OASDI Beneficiaries and Average Benefit Payments
(Beneficiaries in thousands)

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate	Change FY 25/FY 26
Average Number of Beneficiaries				
OASI	59,004	60,835	62,295	1,460
DI	8,431	8,351	8,498	147
TOTAL BENEFICIARIES	**67,435**	**69,186**	**70,793**	**1,607**
Average Monthly Benefit				
Retired Worker	$1,897	$1,978	$2,057	$79
Disabled Worker	$1,527	$1,574	$1,625	$51
COLA Payable in January	3.2%	2.5%	2.4%	-0.1%

Table i.6 – Current Law – Supplemental Security Income Outlays[1]
(in millions)

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate	Change FY 25/FY 26
Federal Benefits[2]	$57,600	$64,067	$66,762	$2,695
Other[3]	$4,606	$4,896	$4,885	-$11
Subtotal, Federal Outlays	**$62,206**	**$68,963**	**$71,647**	**$2,684**
State Supplementary Benefits	$3,082	$3,410	$3,505	$95
State Supplementary Reimbursements	-$3,357	-$3,418	-$3,516	-$98
Subtotal, Net State Supplementary Payments[4]	**-$275**	**-$8**	**-$11**	**-$3**
TOTAL OUTLAYS, Current Law	**$61,931**	**$68,955**	**$71,636**	**$2,681**

[1] Totals may not equal sums of component parts due to rounding.
[2] FY 2024 has 11 payments and FY 2025 and FY 2026 have 12 payments
[3] "Other" includes beneficiary services, research, and administrative expenses.
[4] States must reimburse us in advance for State Supplementary Payments. There will always be 12 State reimbursements in each fiscal year, but there can be 11, 12, or 13 benefit payments per fiscal year because a monthly payment is advanced into the end of the previous month anytime the due date falls on a weekend or holiday. Hence, the "Net State Supplementary Payment" numbers vary from year-to-year depending on the timing of the October benefit payments at the beginning and end of each fiscal year.

Table i.7 – SSI Recipients and Benefit Payments[1]
(Recipients in thousands)

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate	Change FY 25/FY 26
Average Number of SSI Recipients				
Federal Recipients				
Aged	1,118	1,141	1,159	18
Blind or Disabled	6,168	6,138	6,183	45
SUBTOTAL, FEDERAL RECIPIENTS	**7,286**	**7,279**	**7,342**	**63**
State Supplement Recipients (with no Federal SSI payment)	133	135	138	3
TOTAL SSI RECIPIENTS, Current Law	**7,420**	**7,414**	**7,480**	**66**
SSI Federal Recipients Concurrently Receiving				
OASDI Benefits (included above)	2,518	2,522	2,553	31
Average Monthly Benefit				
Aged	$509	$525	$542	$17
Blind and Disabled	$738	$762	$788	$26
AVERAGE, All SSI Recipients	**$703**	**$725**	**$749**	**$24**
Projected COLA Payable in January	3.2%	2.5%	2.4%	-0.1%

Table i.8 – Special Benefits for Certain WWII Veterans Overview[2]
(Outlays in millions)

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate	Change FY 25/FY 26
Federal Benefits	$0	$0	$0	$0
Administration	$0	$0	$0	$0
TOTAL OUTLAYS	**$0**	**$0**	**$0**	**$0**
Average Number of Beneficiaries	48	36	25	-11
Average Monthly Benefit	$346	$353	$361	$8

[1] Totals may not equal sums of component parts due to rounding.
[2] Federal benefits and administrative expenses are less than $500,000 in all years.

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APPROPRIATION LANGUAGE

For payment to the Federal Old-Age and Survivors Insurance Trust Fund and the Federal Disability Insurance Trust Fund, as provided under sections 201(m) and 1131(b)(2) of the Social Security Act, $15,000,000.

Note.—This account is operating under the Full-Year Continuing Appropriations and Extensions Act, 2025 (division A of Public Law 119-4).

GENERAL STATEMENT

The Payments to the Social Security Trust Funds (PTF) account provides Federal fund payments to the Social Security trust funds for several distinct activities. The purpose of each requested payment is to put the trust funds in the same financial position they would have been in had they not borne the cost of certain benefits or administrative expenses chargeable to general revenues. This account includes payments requiring an annual appropriation and payments made to the trust funds under permanent indefinite authority.

ANNUAL APPROPRIATION

The annual PTF appropriation provides reimbursement to the Social Security trust funds for non--trust fund activities. These activities include pension reform and interest on unnegotiated checks. Listed below is the estimated annual appropriation and resulting obligations for FY 2026.

The FY 2026 annual appropriation request, at $15 million, is the same as the FY 2025 level.

Social Security checks, like those issued by other Federal agencies, are negotiable for only 12 months from their date of issue. Under the "Limited Payability" procedure, the value of unnegotiated checks issued on or after October 1, 1989, is credited directly to the trust funds from Treasury's general fund when the checks are canceled. These funds do not pass through the Payments to Social Security Trust Funds account, but the interest adjustments do pass through this account.

Section 1131 of the Social Security Act requires the Commissioner of Social Security to furnish information regarding deferred vested pension rights to pension plan participants (and their dependents or survivors). It permits the administrative expenses of carrying out this pension reform work to be funded initially from the Old-Age and Survivors Insurance (OASI) Trust Fund through SSA's Limitation on Administrative Expenses and authorizes an annual appropriation of Federal funds to reimburse the OASI Trust Fund.

The obligations reported below also include Coal Industry Retiree Health Benefits Act (CIRHBA) activity, funded from unobligated balances carried forward from prior years. These funds, provided in FYs 1996 and 1997, remain available until expended. Please refer to Table 1.3 for a breakout of CIRHBA obligations.

Table 1.1—Annual Appropriation and Obligations
(In thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*FY 2025 to FY 2026 Change*
Appropriation	$10,000	$15,000	**$15,000**	***$0***
Obligations[1]	$8,375	$15,050	**$15,050**	***$0***

PERMANENT INDEFINITE AUTHORITY

Amounts not subject to the annual appropriation include: (1) receipts from Federal income taxation of Social Security benefits; (2) Federal Insurance Contribution Act (FICA) and Self-Employment Contribution Act (SECA) tax credits; (3) reimbursement for Federal employee union administrative expenses; and (4) reimbursement for the loss in FICA tax revenue resulting from the payroll tax holiday provided by the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 and extended by the Temporary Payroll Tax Cut Continuation Act of 2011. The permanent appropriation provides that the trust funds be credited for each of these revenue items.

Taxation of Social Security Benefits

The Social Security Amendments of 1983 provide for taxation of up to one-half of Social Security benefits in excess of certain income thresholds. The Omnibus Reconciliation Act of 1993, P.L. 103-66, amended this provision so that up to 85 percent of benefits could be subject to taxation. The additional amounts collected from this 1993 provision are paid to the Hospital Insurance (HI) Trust Fund; no additional income is due to the Social Security trust funds resulting from the enactment of the 1993 law.

Section 733 of the Uruguay Round Agreements Act, P.L. 103-465, also increased the taxable portion of nonresident aliens' Social Security benefits from 50 percent to 85 percent. The Offices of the General Counsel at SSA and at the Centers for Medicare and Medicaid Services, Department of Health and Human Services, agreed that the additional income resulting from the law should go to the Old-Age, Survivors, and Disability Insurance (OASDI) trust funds as opposed to the HI Trust Fund. The taxes are collected as Federal income taxes; subsequently, an equivalent payment to the Social Security trust funds is made from the general funds of the Treasury. Transfers of estimated aggregate tax liabilities arising from Social Security benefits of U.S. citizens are made quarterly and then adjusted as actual receipts are known. The estimated income from these taxes is $59,413 million in FY 2025 and $72,397 million in FY 2026 from U.S. citizens; the taxes imposed on aliens are withheld from benefit payments and will generate estimated income of $364 million in FY 2025 and $386 million in FY 2026. The estimates for taxation of benefits reflect corresponding growth related to benefit levels and the beneficiary population.

[1] The obligations include CIRHBA activity, funded from unobligated balances carried forward from prior years. These funds, provided in FYs 1996 and 1997, remain available until expended to reimburse the trust funds.

FICA and SECA Tax Credits

The Social Security Amendments of 1983 also provided for the granting of FICA and SECA tax credits to individuals. The tax credits are granted at the time the individual is taxed and are funded by the general funds of the Treasury through reimbursement to the trust funds. The FICA tax credit applies only to wages earned in calendar year 1984. The SECA tax credit applies from calendar year 1984 through calendar year 1989. There are small periodic adjustments made due to tax credits being applied retroactively.

Reimbursement for Employee Union Expenses

In addition to taxation of benefits and tax credits, the PTF account includes reimbursement to the trust funds from general funds, including interest, for certain administrative expenses incurred in support of Federal employee union activities.

Reimbursement for Payroll Tax Holiday

P.L. 111-312, the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010, reduced employees' payroll contributions from 6.2 percent to 4.2 percent for calendar year 2011. P.L. 112-78, the Temporary Payroll Tax Cut Continuation Act of 2011, amended P.L. 111-312 to extend the reduced payroll contributions through February 29, 2012. On February 22, 2012, the Middle Class Tax Relief and Job Creation Act of 2012 (P.L. 112-96) extended the reduced rate through December 31, 2012. The general funds reimburse the trust funds for this loss in tax revenue. While the law has expired, we expect that small periodic adjustments for prior years will continue to occur in future years.

BUDGETARY RESOURCES

The FY 2026 annual appropriation request for PTF is $15,000,000. We expect to make $72,808,050,000 in payments to the trust funds in FY 2026, including amounts appropriated under permanent indefinite authority.

Table 1.2 —Amounts Available for Obligation
(In thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate
Annual Appropriation	**$10,000**	**$15,000**	**$15,000**
Permanent Appropriation	**$53,759,576**	**$59,787,000**	**$72,793,000**
Total Appropriation	$53,769,576	$59,802,000	$72,808,000
Unobligated Balance, Start-of-Year	$12,822	$12,693	$12,643
Subtotal Budgetary Resources	**$53,782,398**	**$59,814,693**	**$72,820,643**
Obligations	**$53,767,951**	**$59,802,050**	**$72,808,050**
Unobligated Balance, End-of-Year	$12,693	$12,643	$12,593
Unobligated Balance, Lapsing	$1,754	$0	$0

The “Start-of-Year” and “End-of-Year” unobligated balances represent funds appropriated for the CIRHBA in FYs 1996 and 1997 and made available until expended. The lapsed unobligated balance represents the amount of the annual appropriation not obligated in the current year.

BUDGET AUTHORITY AND OBLIGATIONS BY ACTIVITY

The table below displays the budget authority and obligations for each of the PTF activities funded by the annual appropriation. Prior year unobligated balances fund CIRHBA obligations.

Table 1.3—New Budget Authority & Obligations, Annual Authority[1]
(In thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate
Appropriation			
Pension Reform	$3,300	$6,000	$6,000
Unnegotiated Checks	$6,700	$9,000	$9,000
Coal Industry Retiree Health Benefits	$0	$0	$0
Total Annual Appropriation	**$10,000**	**$15,000**	**$15,000**
Obligations			
Pension Reform	$1,645	$6,000	$6,000
Unnegotiated Checks	$6,601	$9,000	$9,000
Coal Industry Retiree Health Benefits	$129	$50	$50
Total Obligations	**$8,375**	**$15,050**	**$15,050**

[1] Totals may not add due to rounding.

BACKGROUND

AUTHORIZING LEGISLATION

The Social Security Act sections described below authorize the PTF account.

Table 1.4—Authorizing Legislation
(In thousands)

	Amount Authorized	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate
Pension Reform: S.S. Act, Section 1131(b)(2)	Indefinite	$3,300	$6,000	$6,000
Unnegotiated Checks: S.S. Act, Section 201(m); Social Security Amendments of 1983, Section 152	Indefinite	$6,700	$9,000	$9,000
Coal Industry Retiree Health Benefits: Internal Revenue Code of 1986, Sections 9704 and 9706; Energy Policy Act of 1992, Section 19141[1]	Indefinite	$0	$0	$0
Subtotal Annual PTF Appropriation		**$10,000**	**$15,000**	**$15,000**
Reimbursement for Union Administrative Expenses: FY 2002 Social Security Appropriations Act	Permanent Indefinite	$10,043	$10,000	$10,000
Employee Payroll Tax Holiday: P.L. 111-312, Section 601, As Amended By Temporary Payroll Tax Cut Continuation Act: P.L. 112-78	Permanent Indefinite	$34	$0	$0
Taxation of Benefits, U.S.: Social Security Amendments of 1983, Section 121	Permanent Indefinite	$53,446,996	$59,413,000	$72,397,000
Taxation of Benefits, Nonresident Aliens: Social Security Amendments of 1983, Section 121	Permanent Indefinite	$302,500	$364,000	$386,000
FICA/SECA Tax Credits: Social Security Amendments of 1983, Section 124(b)	Permanent Indefinite	$3	$0	$0
Subtotal Permanent PTF Appropriation		**$53,759,576**	**$59,787,000**	**$72,793,000**
Total Appropriation		**$53,769,576**	**$59,802,000**	**$72,808,000**

[1] We do not request additional funds because the balance of the $10,000,000 per year appropriated in FYs 1996 and 1997 remains available until expended to reimburse the trust funds.

APPROPRIATION HISTORY

The table below displays our annual appropriation request, amounts approved by the House and Senate, and the amount Congress ultimately appropriated. This does not include amounts appropriated under permanent authority.

Table 1.5—Appropriation History Table

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
2016	$20,400,000	$20,400,000[1]	$20,400,000[2]	$11,400,000[3]
2017	$11,400,000	$11,400,000[4]	$11,400,000[5]	$11,400,000[6]
2018	$11,400,000	$11,400,000[7]	$11,400,000[8]	$11,400,000[9]
2019	$11,000,000	$11,000,000[10]	$11,000,000[11]	$11,000,000[12]
2020	$11,000,000	$11,000,000[13]	- - - [14]	$11,000,000[15]
2021	$11,000,000	$11,000,000[16]	- - - [17]	$11,000,000[18]
2022	$11,000,000	$11,000,000[19]	- - - [20]	$11,000,000[21]
2023	$11,000,000	$11,000,000[22]	- - - [23]	$11,000,000[24]
2024	$10,000,000	$10,000,000[25]	$10,000,000[26]	$10,000,000[27]
2025	$15,000,000	$15,000,000[28]	$15,000,000[29]	$15,000,000[30]
2026	$15,000,000			

[1] H.R. 3020.
[2] S. 1695.
[3] Consolidated Appropriations Act, 2016 (P.L. 114-113).
[4] H.R. 5926.
[5] S. 3040.
[6] Consolidated Appropriations Act, 2017 (P.L 115-31).
[7] H.R. 3358.
[8] S. 1771.
[9] Consolidated Appropriations Act, 2018 (P.L 115-141).
[10] H.R. 6470.
[11] S. 3158.
[12] Department of Defense and Labor, Health and Human Services, and Education Appropriations Act, 2019 and Continuing Appropriations Act, 2019 (P.L 115-245).
[13] H.R. 2740.
[14] The Senate Committee on Appropriations did not report a bill.
[15] Departments of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Act, 2020 in the Further Consolidated Appropriations Act, 2020 (P.L. 116-94).
[16] H.R. 7614.
[17] The Senate Committee on Appropriations did not report a bill.
[18] Consolidated Appropriations Act, 2021 (P.L. 116-260).

[19] H.R. 4502
[20] The Senate Committee on Appropriations did not report a bill
[21] Consolidated Appropriations Act, 2022 (P.L. 117-103).
[22] H.R. 8295
[23] The Senate Committee on Appropriations did not report a bill.
[24] Consolidated Appropriations Act, 2023 (P.L. 117-328)
[25] H.R. 5894. The House bill was passed at the subcommittee level and did not go to the full committee.
[26] S. 2624.
[27] Further Consolidated Appropriations Act, 2024 (P.L. 118-47)
[28] H.R. 9029.
[29] S. 4942.
[30] Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4).

PENSION REFORM

Authorizing Legislation: Section 1131(b)(2) of the Social Security Act.

PURPOSE AND METHOD OF OPERATION

The purpose of this payment is to reimburse the OASI Trust Fund for the cost of certain pension reform activities chargeable to Federal funds.

Table 1.6—Pension Reform: Budget Authority

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*FY 2025 to FY 2026 Change*
Budget Authority	$3,300,000	$6,000,000	**$6,000,000**	*$0*

The Employee Retirement Income Security Act of 1974, P.L. 93-406 (Pension Reform Act, also known as ERISA) established section 1131 of the Social Security Act. This requires the Commissioner of Social Security to furnish information regarding deferred vested pension rights to pension plan participants (and their dependents or survivors), either upon request or automatically upon application for retirement, survivors, or disability insurance benefits.

Each time an employee leaves employment that earned him or her vested rights to a pension, we receive related information from the Internal Revenue Service (IRS) in either paper or electronic format. We control, scan (using optical character recognition), and, if necessary, key the paper forms and transfer the data to the ERISA mainframe system. We add these data, along with electronic data received from the IRS to the ERISA Master Files after the name is verified against the NUMIDENT (SSN record) database. Each month, we compare an activity file of new benefit applications to the ERISA Master Files. We send an ERISA notice of pension plan eligibility to individuals included in both the activity file and the ERISA Master Files. This notice includes the information the worker needs to contact the pension plan administrator. We also resolve exceptions and respond to inquiries from employers and the public.

Section 1131(b)(1) permits the administrative expenses of carrying out this pension reform work to be funded initially from the OASI Trust Fund through our LAE account. Section 1131(b)(2) authorizes an annual appropriation of Federal funds to reimburse the OASI Trust Fund. We began to incur pension reform administrative expenses in FY 1977.

UNNEGOTIATED CHECKS

Authorizing Legislation: Section 201(m) of the Social Security Act and Section 152 of P.L. 98-21.

PURPOSE AND METHOD OF OPERATION

The purpose of this payment is to reimburse the OASI and DI Trust Funds for the value of interest on benefit checks cashed after 6 months or subsequently canceled.

Table 1.7—Unnegotiated Checks: Budget Authority

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*FY 2025 to FY 2026 Change*
Budget Authority	$6,700,000	$9,000,000	**$9,000,000**	*+$0*

This activity was originally established to reimburse the trust funds for uncashed benefit checks and accrued interest. Beginning October 1, 1989, Social Security checks, like those issued by other Federal agencies, are negotiable for only 12 months from their date of issue under the provisions of the Competitive Equality Banking Act (CEBA) of 1987 (P.L. 100-86). In the 14th month after issue, the Department of the Treasury prepares a listing of checks outstanding from each agency, cancels those checks, and refunds the value of checks canceled to the authorizing agencies. Under this "Limited Payability" procedure, the value of unnegotiated checks issued on or after October 1, 1989, are credited directly to the trust funds from Treasury's general fund when the checks are canceled, pursuant to P.L. 100-86. These funds do not pass through the PTF account. However, the interest adjustment must be paid through this account because CEBA made no provision for it.

This appropriation funds the estimated ongoing level of activity and represents the value of interest for unnegotiated OASDI benefit checks.

Table 1.8—Unnegotiated Checks: Obligations

Fiscal Year	Obligations
FY 2016	$2,091,901
FY 2017	$2,028,629
FY 2018	$2,402,793
FY 2019	$2,941,121
FY 2020	$2,575,849
FY 2021	$1,523,486
FY 2022	$1,894,718
FY 2023	$3,810,668
FY 2024	$6,600,950
FY 2025 Estimate	$9,000,000
FY 2026 Estimate	**$9,000,000**

RATIONALE FOR BUDGET REQUEST

The FY 2026 request is for $9,000,000 to reimburse the OASDI trust funds for the value of interest on unnegotiated checks. The FY 2026 request is equal to the FY 2025 level.

Table 1.9—Unnegotiated Checks: Budget Authority by Trust Fund

	FY 2026 Estimate
OASI Trust Fund	$6,000,000
DI Trust Fund	$3,000,000
Total	**$9,000,000**

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APPROPRIATION LANGUAGE

For carrying out titles XI and XVI of the Social Security Act, section 401 of Public Law 92603, section 212 of Public Law 93-66, as amended, and section 405 of Public Law 95216, including payment to the Social Security trust funds for administrative expenses incurred pursuant to section 201(g)(1) of the Social Security Act, $49,447,966,000, to remain available until expended: Provided, That any portion of the funds provided to a State in the current fiscal year and not obligated by the State during that year shall be returned to the Treasury: Provided further, That not more than $91,000,000 shall be available for research and demonstrations under sections 1110, 1115, and 1144 of the Social Security Act, and remain available through September 30, 2028.

For making, after June 15 of the current fiscal year, benefit payments to individuals under title XVI of the Social Security Act, for unanticipated costs incurred for the current fiscal year, such sums as may be necessary.

For making benefit payments under title XVI of the Social Security Act for the first quarter of fiscal year 2027, $23,500,000,000, to remain available until expended.

Note — This account is operating under the Full-Year Continuing Appropriations and Extensions Act, 2025 (division A of Public Law 119-4).

LANGUAGE ANALYSIS

The appropriation language provides us with the funds needed to carry out our responsibilities under the Supplemental Security Income (SSI) program. This includes the funds needed to pay Federal benefits, administer the program, and provide beneficiary services to recipients. The budget authority for these activities is made available until expended, providing us the authority to carry over unobligated balances for use in future fiscal years. Furthermore, the language includes three-year authority for research and demonstration projects.

In addition, the language includes indefinite authority beginning June 15, in the event Federal benefit payment obligations in FY 2026 are higher than expected, and we do not have sufficient unobligated balances to cover the difference. Consistent with previous years, the appropriation also includes an advance appropriation for Federal benefit payments in the first quarter of FY 2027 to ensure the timely payment of benefits in case of a delay in the FY 2027 appropriations bill.

Table 2.1—Appropriation Language Analysis

Language provision	Explanation
"For carrying out titles XI and XVI of the Social Security Act… including payment to the Social Security trust funds for administrative expenses incurred pursuant to section 201(g)(1) of the Social Security Act, $49,447,966,000, to remain available until expended:"	Appropriates funds for Federal benefit payments, administrative expenses, beneficiary services, and research and demonstration projects under the SSI program. We may carry over unobligated balances for use in future fiscal years.
"Provided, That any portion of the funds provided to a State in the current fiscal year and not obligated by the State during that year shall be returned to the Treasury."	Ensures that States do not carry unobligated balances of Federal funds into the subsequent fiscal year. Applies primarily to the beneficiary services activity.
Provided further, That not more than $91,000,000 shall be available for research and demonstrations under sections 1110, 1115, and 1144 of the Social Security Act, and remain available through September 30, 2028.	Specifies that not more than $91 million of the SSI appropriation is available for research and demonstration projects. We may carry over unobligated balances through September 30, 2028, at which point, funds are expired.
"For making, after June 15 of the current fiscal year, benefit payments to individuals under title XVI of the Social Security Act, for unanticipated costs incurred for the current fiscal year, such sums as may be necessary."	Provides an indefinite appropriation to finance any shortfall in the definite appropriation for benefit payments during the last months of the fiscal year.
"For making benefit payments under title XVI of the Social Security Act for the first quarter of fiscal year 2027, $23,500,000,000, to remain available until expended."	Appropriates funds for benefit payments in the first quarter of the subsequent fiscal year. Ensures that recipients will continue to receive benefits during the first quarter of FY 2027 in the event of a temporary funding delay.

GENERAL STATEMENT

The SSI program guarantees a minimum level of income to financially needy individuals who are aged, blind, or disabled. Title XVI of the Social Security Act authorized the program, and payments began January 1974. It is Federally-administered and funded from general revenues.

Prior to the establishment of the SSI program, the Social Security Act provided means-tested assistance through three separate programs—Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled. Federal law only established broad guidelines, with each State largely responsible for setting its own eligibility and payment standards. The SSI program was established to provide uniform standards across States.

Table 2.2—Summary of Appropriations and Obligations[1]
(in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*Change*
Appropriation	$61,165,042	$67,065,042	$71,547,966	+$4,482,924
Obligations[2]	$63,558,087	$68,964,798	$71,682,404	+$2,717,606
First Quarter Advance Appropriation for Subsequent Fiscal Year	$21,700,000	$22,100,000	$23,500,000	+$1,400,000

PROGRAM OVERVIEW

Eligibility Standards

As a means-tested program, individuals must have income and resources below specified levels to be eligible for benefits. Program rules allow some specific categories of income and resources to be either totally or partially excluded.[3] The process of evaluating eligibility and payment levels for the SSI program and addressing the accuracy of payments is inherently complex due to the program rules.

An individual's benefit payment is reduced dollar for dollar by the amount of his or her "countable income"—income less all applicable exclusions—in a given month. Income in the SSI program includes "earned income," such as wages and net earnings from self-employment and "unearned income," such as Social Security benefits, unemployment compensation, deemed

[1] Does not include State supplementary payments and reimbursements or the corresponding State supplement user fee collections; user fees are included in the Limitation on Administrative Expenses (LAE) appropriation.
[2] Obligations in FY 2026 will not match the President's Budget Appendix due to revised research and demonstration project estimates.
[3] The ABLE Act of 2014 created a new type of tax-advantaged account that has a limited effect on an individual's eligibility for the SSI program and other Federal means-tested programs.

income from a spouse or parent, and the value of in-kind support and maintenance. Different exclusion rules apply for different types of income.

Benefit Payments

We estimate we will pay $66.8 billion in Federal benefits to about 7.3 million SSI recipients in FY 2026. Including State supplementary payments, we expect to pay a total of $70.3 billion and administer payments to nearly 7.5 million recipients.

Federal benefit payments represent approximately 93 percent of Federal SSI spending. Administrative expenses represent nearly 7 percent of spending; beneficiary services and research and demonstration projects make up the remaining less than half a percent.

Incentives for Work and Opportunities for Vocational Rehabilitation

The SSI program is designed to help recipients with disabilities achieve independence by encouraging and supporting their attempts to work. The program includes a number of work incentive provisions that enable recipients who are blind or disabled to work and retain benefits. The program also includes provisions to help disabled beneficiaries obtain vocational rehabilitation and employment support services. These provisions were revised by legislation establishing the Ticket to Work program, which is discussed in more detail in the Beneficiary Services section.

State Supplementation

Supplementation is mandatory for certain recipients who were on State rolls just prior to the creation of the Federal program on January 1, 1974. Otherwise, States are encouraged to supplement the Federal benefit and may elect to have us administer their State supplementation program. States that choose to have us administer their program reimburse us in advance and we make the payment on behalf of the State. Participating States also reimburse us for the cost of administering their program, based on a user fee schedule established by the Social Security Act. The user fee is $15.22 per SSI check payment in FY 2025 and is expected to increase to $15.60 in FY 2026. The Department of the Treasury receives the first $5.00 of each fee and we retain, as part of our Limitation on Administrative Expenses (LAE) budget, the amount over $5.00. Additional information regarding State supplementation can be found within the LAE section.

Coordination with Other Programs

We play an important role in helping States administer Medicaid and the Supplemental Nutrition Assistance Program (SNAP). Provisions in the SSI statute ensure that payments made by States or under the Social Security program are not duplicated by SSI benefits.

Generally, SSI recipients are categorically eligible for Medicaid. States may either use SSI eligibility criteria for determining Medicaid eligibility or use their own, provided the criteria are no more restrictive than the State's January 1972 medical assistance standards.

SSI recipients may also qualify for SNAP. Pursuant to section 11 of the Food and Nutrition Act of 2008 (P.L. 88-525, as amended through P.L. 116-260), we work with SSI applicants and recipients in a variety of ways to help them file for SNAP, including informing them of their potential benefits, making applications available to them, and in some cases helping them complete their applications in our field offices. We also share applicant data with a number of States.

FY 2026 PRESIDENT'S BUDGET REQUEST

The SSI appropriation includes funds for Federal benefit payments, administrative expenses, beneficiary services, and research and demonstration projects. In total, the FY 2026 President's Budget request is $71,547,966,000. However, this includes $22,100,000,000 appropriated for the first quarter of FY 2026 in the FY 2025 Full-Year Continuing Appropriations and Extensions Act. The appropriation language provides us with our remaining appropriation for FY 2026, $49,447,966,000—the total amount requested for FY 2026 less the first quarter advance.

Similarly, in addition to the amount above, the request includes an advance appropriation of $23,500,000,000 for Federal benefit payments in the first quarter of FY 2027. This advance is to ensure recipients continue to receive their benefits at the beginning of the subsequent fiscal year in case there is a delay in passing that year's appropriation.

Table 2.3—Appropriation Detail [1,2]
(in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*Change*
Advance for Federal Benefits[3],[4]	$15,800,000	$21,700,000	$22,100,000	
Regular for Federal Benefits	$40,528,000	$40,528,000	$44,662,000	
Subtotal Federal Benefits	**$56,328,000**	**$62,228,000**	**$66,762,000**	***+$4,534,000***
Base Administrative Expenses	$3,279,742	$3,230,976	$2,946,098	*-$284,878*
Program Integrity (Base)	$214,010	$231,626	$250,269	*+$18,643*
Program Integrity (Adjustment)	$1,115,290	$1,146,440	$1,423,599	*+$277,159*
Subtotal Administrative	**$4,609,042**	**$4,609,042**	**$4,619,966**	***+$10,924***
Beneficiary Services	$137,000	$137,000	$75,000	*-$62,000*
Research and Demonstration	$91,000	$91,000	$91,000	*$0*
Subtotal Advanced Appropriation	**$15,800,000**	**$21,700,000**	**$22,100,000**	
Subtotal Regular Appropriation	**$45,365,042**	**$45,365,042**	**$49,447,966**	
Total Appropriation	$61,165,042	$67,065,042	$71,547,966	*+$4,482,924*
Advance for Subsequent Year	**$21,700,000**	**$22,100,000**	**$23,500,000**	***+$1,400,000***

[1] Does not include State supplementary payments and reimbursements or the corresponding State supplementary user fee collections; user fees are included in the LAE appropriation.
[2] Totals may not add due to rounding.
[3] Amount provided in the previous year's appropriation bill.
[4] The Advance for Federal Benefits, which covers payments for the first quarter of the subsequent fiscal year, can have three or four monthly payments depending on whether October 1 falls on a weekend. This can cause a substantial variation in the Advance and Regular for Federal Benefits budget authority requests when comparing across fiscal years.

BUDGETARY RESOURCES

The SSI annual appropriation consists of a regular appropriation made available by the current year's appropriation bill and an advance made available by the prior year's appropriation. This advance is for Federal benefit payments in the first quarter of the subsequent fiscal year to ensure recipients continue to receive their benefits in case there is a delay in passing that year's appropriation bill. The FY 2026 President's Budget is $71,547,966,000, including $22,100,000,000 appropriated for the first quarter of FY 2026 in the FY 2025 Full-Year Continuing Appropriations and Extensions Act.

Table 2.4—Amounts Available for Obligation[1,2]
(in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate
Regular Appropriation	$45,365,042	$45,365,042	$49,447,966
Advanced Appropriation from prior FY	$15,800,000	$21,700,000	$22,100,000
Total Annual Appropriation	**$61,165,042**	**$67,065,042**	**$71,547,966**
Federal Unobligated Balance	$3,423,097	$1,490,372	$277,498
Recovery of Prior-Year Obligations	$370,302	$0	$0
Indefinite Authority[3]	$0	$621,980	$0
Subtotal Federal Resources	**$64,958,441**	**$69,177,394**	**$71,825,464**
State Supp. Reimbursements	$3,356,885	$3,418,000	$3,516,000
State Supp. Unobligated Balance	$5,910	$280,641	$288,641
Total Budgetary Resources[4]	**$68,321,236**	**$72,876,035**	**$75,630,105**
Federal Obligations	**$63,558,087**	**$68,964,798**	**$71,682,404**
State Supp. Obligations	$3,082,154	$3,410,000	$3,505,000
Total Obligations[5]	**$ 66,640,241**	**$72,374,798**	**$75,187,404**
Federal Unobligated Balance	$1,400,354	$212,596	$143,060
State Supp. Unobligated Balance	$280,641	$288,641	$299,641
Total Unobligated Balance	**$1,680,995**	**$501,237**	**$442,701**

[1] Does not include State supplementary user fees; user fees are included in the LAE appropriation.
[2] Totals may not add due to rounding.
[3] Any portion of the Federal benefits carryover shown that results from indefinite authority will be returned to Treasury in the new year, as soon as the actual amount is determined.
[4] Total Budgetary Resources and Total Unobligated Balance for FY 2025 and FY 2026 will not match the amounts included in the President's Budget Appendix due to multi-year funding carrying over in the LAE account in one fiscal year and then being made available in the SSI account for a subsequent fiscal year.
[5] Obligations in FY 2026 will not match the President's Budget Appendix due to revised research and demonstration project estimates.

Supplemental Security Income Program

The SSI annual appropriation was $61.2 billion in FY 2024. The enacted FY 2025 appropriation is $67.1 billion. We have the authority to carry over unobligated balances for use in future fiscal years for Federal benefit payments and administrative expenses, and beneficiary services because the amounts appropriated are made available until expended. We carried over approximately $1.4 billion in Federal unobligated balances into FY 2025. We expect to carry over approximately $213 million into FY 2026.

In addition to these appropriated amounts, we have spending authority in the amount of the advance reimbursement we receive from States to pay their State supplementary benefits. Because States reimburse us in advance, we carry over the amount received for the October 1 payment, reimbursed at the end of September in the prior fiscal year, for use in the subsequent fiscal year.

ANALYSIS OF CHANGES

The FY 2026 request represents an increase of approximately $4.5 billion from the FY 2025 level. We plan to use unobligated balances to partially fund administrative expenses, beneficiary services, and research and demonstration projects in FY 2025 and FY 2026. In total, we plan to use approximately $1.3 billion in unobligated balances and recoveries in FY 2025 and $134 million in unobligated balances and recoveries in FY 2026.

Federal Benefit Payments

The FY 2026 request for Federal Benefit payments is approximately $4.5 billion more than the FY 2025 level. The increase is bolstered by the January 2026 COLA and partially offset by the impact of Old-Age, Survivors, and Disability Insurance (OASDI) COLAs on concurrent SSI/OASDI recipients. Since OASDI benefits are counted as income in the SSI program, the annual OASDI COLA decreases the SSI benefit payment for concurrent recipients.

We estimate the first quarter advance for FY 2027 will be $1.4 billion more than the first quarter advance for FY 2026. Monthly SSI benefit payments are made on the first of the month, unless the first falls on a weekend or Federal holiday. In that case, the payment is made on the prior business day at the end of the previous month. When October 1 falls on a weekend or Federal holiday, the payment is made in the prior fiscal year at the end of September. This timing of payments results in 11, 12, or 13 payments in a given fiscal year, and three or four in a given quarter. The first quarter in FY 2026 and the first quarter in FY 2027 will have four benefit payments.

Administrative Expenses

The FY 2026 request for administrative expenses is approximately $11 million more than the FY 2025 level and includes $1.4 billion of the $2.1 billion adjustment funding for program integrity work in the SSI program. We expect to use $90 million in carryover funds in FY 2025 and approximately $65 million in carryover funds in FY 2026 to cover estimated obligations. For details about program integrity funding and activities, please refer to the Program Integrity exhibit in the LAE section.

Beneficiary Services

We are requesting $75 million in new authority for FY 2025. This is $62 million less than our FY 2025 level; however, our FY 2026 request funds an estimated 4 percent increase in obligations above the FY 2025 level as we obligate available prior year balances. Our request assumes an increased level of vocational rehabilitation reimbursement awards, and Ticket payments to Employment Networks under the Ticket to Work program. We expect to use $2 million in carryover funds in FY 2025 and $70 million in carryover funds in FY 2026 to cover our estimated obligations.

Research and Demonstrations

The FY 2026 request for research and demonstration projects is the same as the FY 2025 level. We expect to use carryover funds in FY 2025 and FY 2026 in addition to our requested appropriation to cover our estimated obligations. For more information, please see the *Research and Demonstration* exhibit.

Table 2.5—Summary of Changes[1,2]
(in thousands)

	FY 2025 Estimate	**FY 2026 Estimate**	***Change***
Appropriation	**$67,065,042**	**$71,547,966**	***+4,482,924***
Obligations Funded from Prior-Year Unobligated Balances and Recoveries	$1,277,776	$134,438	*-$1,143,338*
Obligations Funded from Indefinite Authority	$621,980	$0	*-$621,980*
Estimated Federal Obligations[3]	**$68,964,798**	**$71,682,404**	***+$2,717,606***

[1] Does not include State supplementary payments and reimbursements or the corresponding State supplement user fee collections; user fees are included in the LAE appropriation.
[2] Totals may not add due to rounding.
[3] Obligations in FY 2026 will not match the President's Budget Appendix due to revised research and demonstration project estimates.

Table 2.6—Explanation of SSI Budget Changes from FY 2025 to FY 2026
(in thousands)

	FY 2025 Obligations	*Change*
Federal Benefit Payments	$62,228,000	
• COLA – 2.4% beginning January 2026		+$2,052,000
• Net change due to annualized closings and awards		+$1,142,000
• Effect of OASDI COLA for concurrent SSI/OASDI Recipients		-$499,000
• Indefinite Authority	$621,980	
Federal Benefit Payments – Carryover	$1,217,020	
Administrative Expenses	$4,609,042	
• Increase in base funding		+$10,924
Administrative Expenses – Carryover	$90,000	
• Decrease in amount of carryover funding planned for obligation in FY 2026		-$25,098
Beneficiary Services	$137,000	
• Decrease in base funding		-$62,000
Beneficiary Services – Carryover	$2,000	
• Increase in amount of carryover funding planned for obligation in FY 2026		+$68,000
Research and Demonstration	$91,000	
Research and Demonstration – Carryover	-$31,244	
• Increase in amount of carryover funding planned for obligation in FY 2026		+$30,780
Total Obligations Requested, Net Change	**$68,964,798**	**+$2,717,606**

NEW BUDGET AUTHORITY AND OBLIGATIONS BY ACTIVITY

The table below displays budget authority and obligations for the five main SSI activities – Federal benefit payments, administrative expenses, program integrity, beneficiary services, and research and demonstration.

Table 2.7—New Budget Authority and Obligations by Activity[1,2]
(in thousands)

	FY 2024 Actual	FY 2025 Enacted[3]	FY 2026 Estimate[18]
Federal Benefit Payments			
Appropriation	$56,328,000	$62,228,000	$66,762,000
Obligations	$58,750,373	$64,067,000	$66,762,000
Monthly Check Payments	11	12	12
Base Administrative Expenses			
Appropriation	$3,279,742	$3,230,976	$2,946,098
Obligations	$3,271,294	$3,297,976	$3,011,000
Program Integrity (Base)			
Appropriation	$214,010	$231,626	$250,269
Obligations	$214,010	$231,626	$250,269
Program Integrity (Adjustment)			
Appropriation	$1,115,290	$1,146,440	$1,423,599
Obligations	$1,115,290	$1,169,440	$1,423,599
Beneficiary Services			
Appropriation	$137,000	$137,000	$75,000
Obligations	$109,174	$139,000	$145,000
Research and Demonstration			
Appropriation	$91,000	$91,000	$91,000
Obligations[4]	$97,946	$59,756	$90,536
Total Appropriation	**$61,165,042**	**$67,065,042**	**$71,547,966**
Total Federal Obligations	**$63,558,087**	**$68,964,798**	**$71,682,404**

[1] Does not include State supplementary payments and reimbursements or the corresponding State supplement user fee collections; user fees are included in the LAE appropriation.
[2] Totals may not add due to rounding.
[3] We expect to use carryover of prior year unobligated balances and recoveries for FY 2025 and FY 2026 obligations.
[4] Obligations in FY 2026 will not match the President's Budget Appendix due to revised research and demonstration project estimates.

FEDERAL BENEFIT PAYMENTS

Authorizing Legislation: Section 1602, 1611, and 1617 of the Social Security Act.

PURPOSE AND METHOD OF OPERATION

The SSI program was established to pay low-income aged, blind, and disabled individuals a minimum level of income through Federally-administered monthly cash payments. In many cases, these payments supplement income from other sources, including Social Security benefits and State programs. In FY 2026, we estimate benefit payments will total approximately $67 billion for approximately 7.3 million Federal SSI recipients.

Table 2.8—Federal Benefit Payments: New Budget Authority and Obligations[1]
(in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*Change*
Appropriation	**$56,328,000**	**$62,228,000**	**$66,762,000**	***+$4,534,000***
Obligations Funded from Prior-Year Unobligated Balance and Recoveries	*$2,422,373*	*$1,217,020*	*$0*	***-$1,217,020***
Indefinite Authority	*$0*	*$621,980*	*$0*	***-$621,980***
Obligations	**$58,750,373**	**$64,067,000**	**$66,762,000**	***+$2,695,000***
Advance for subsequent fiscal year	$21,700,000	$22,100,000	$23,500,000	*+$1,400,000*

RATIONALE FOR BUDGET REQUEST

In FY 2026, we are requesting $67 billion in new budget authority for Federal benefit payments, and $23.5 billion in an advance appropriation for the first quarter of FY 2027. We estimate benefit payments based on a number of interrelated factors including the number of SSI recipients, number of applications, award and termination rates, cost-of-living adjustments, maximum benefit rates, average payment amounts, and number of payments per fiscal year.

[1] Federal benefit numbers reflect the most recent estimates from our Office of the Chief Actuary.

Table 2.9—Check Payments by Fiscal Year

	Number of Check Payments	Federal Benefit Obligations
FY 2017	12	$54,729,471,841
FY 2018	11	$50,949,421,097
FY 2019	12	$55,590,534,196
FY 2020	12	$56,161,567,718
FY 2021	12	$55,717,174,588
FY 2022	13	$60,910,067,748
FY 2023	12	$60,417,887,895
FY 2024	11	$58,750,372,811
FY 2025	12	$64,067,000,000
FY 2026	**12**	**$66,762,000,000**

ADMINISTRATIVE EXPENSES

Authorizing Legislation: Sections 201(g)(1) of the Social Security Act.

PURPOSE AND METHOD OF OPERATION

Administrative expenses for the SSI program are funded from general revenues. Section 201(g)(1) of the Social Security Act provides that administrative expenses for the SSI program, including Federal administration of State supplementary payments, may be financed from the Social Security trust funds with reimbursement, including any interest lost, to the trust funds from general revenues.

This appropriation funds the SSI program share of administrative expenses incurred through the LAE account. Amounts appropriated are available for current year SSI administrative expenses, as well as for prior year administrative expenses that exceeded the amount available through this account for the prior year. If those excess prior year amounts were paid out of the Social Security trust funds, then current year SSI funds must be used to reimburse these trust funds with interest.

The legislative history of the 1972 amendments (which established this funding mechanism) indicates a desire to obtain economy of administration by giving us the responsibility for the SSI program because of its existing field office network and its administrative and automated data processing facilities. Because of the integration of the administration of the SSI and Social Security programs, it was desirable to fund them from a single source (the LAE account). This process requires that the trust funds and the SSI account pay their appropriate shares to the LAE account, which in turn manages the administrative expenses on behalf of the paying accounts. The determination is based on a Government Accountability Office-approved method of cost analysis of the respective expenses of the SSI and Social Security insurance programs, and statute mandates a final settlement by the end of the subsequent fiscal year.

Table 2.10—Administrative Expenses: New Budget Authority and Obligations
(in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*Change*
Total Appropriation	**$4,609,042**	**$4,609,042**	**$4,619,966**	***+$10,924***
Obligations Funded from Prior-Year Unobligated Balance	*$0*	*+$90,000*	*+$64,902*	***-$25,098***
Obligations	**$4,600,594**	**$4,699,042**	**$4,684,868**	***-$14,174***

RATIONALE FOR BUDGET REQUEST

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, stewardship, and efficiency.

The FY 2026 request for SSI administrative expenses is approximately $4.6 billion. This appropriation is used to reimburse the trust funds for the SSI program's share of administrative expenses. This amount includes about $1.7 billion specifically for FY 2026 SSI program integrity activities.

These amounts exclude funding made available in the LAE account from State user fees for our expenses for administering SSI State supplementary payments. The LAE account assumes funding of up to $170 million in FY 2026 to administer SSI state supplementary payments.

BENEFICIARY SERVICES

Authorizing Legislation: Sections 1148 and 1615(d) of the Social Security Act

PURPOSE AND METHOD OF OPERATION

Beneficiary services consist of the Vocational Rehabilitation (VR) Cost Reimbursement and Ticket to Work (TTW) programs. The objective of the programs is to assist disabled individuals in returning to work. The trust funds and general revenues fund beneficiary services. Section 222(d)(1) of the Social Security Act authorizes transfers from the Old-Age and Survivors Insurance (OASI) and Disability Insurance (DI) trust funds to reimburse for reasonable and necessary costs of vocational rehabilitation services for individuals. The OASI and DI trust funds also fund payments to Employment Networks (EN) as part of the TTW program. Beneficiary services funded through the trust funds do not require appropriation. The general revenues fund beneficiary services for disabled Supplemental Security Income (SSI) recipients as described below.

Table 2.11—Beneficiary Services: New Budget Authority and Obligations
(in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*FY 2025 to FY 2026 Change*
Appropriation	**$137,000**	**$137,000**	**$75,000**	*-$62,000*
Prior-Year Unobligated Balances and Recoveries	$112,315	$140,141	$138,141	*-$2,000*
Total Budgetary Resources	**$249,315**	**$277,141**	**$213,141**	*-$64,000*
Obligations	**$109,174**	**$139,000**	**$145,000**	*+$6,000*

Under the VR cost reimbursement program, we repay VR agencies for the reasonable and necessary costs of services that successfully help disabled recipients return to work. VR agencies are successful when a disabled recipient performs substantial gainful activity (SGA) for a continuous period of 9 out of 12 months.[1]

Under the TTW program, authorized by the Ticket to Work and Work Incentives Improvement Act of 1999 (P.L. 106-170), we pay ENs for providing vocational rehabilitation, employment, and other support services to disabled SSI recipients. The recipients select an EN, and when EN

[1] In 2025, we consider non-blind and blind disabled beneficiaries to be performing SGA if they earn more than $1,620 and $2,700 per month, respectively.

services result in prescribed work milestones and outcomes that may reduce reliance on Federal cash benefits, we pay ENs.

VR agencies can serve as ENs in the TTW program or receive payments under our VR cost reimbursement program. Ticket payments, unlike VR cost reimbursement payments, are not based on the costs of specific services provided by the EN. We pay ENs using either an outcome-milestone payment method or an outcome-only payment method.

We base Ticket payment amounts for SSI recipients on the prior year's average disability benefit payable under Title XVI. While we previously made Ticket payments only upon request, we now also initiate payments to ENs when information in our records indicates the recipient has achieved the prerequisite earnings and all other requirements qualifying the EN for a payment are met.

RATIONALE FOR BUDGET REQUEST

We are requesting $75 million in new budget authority for beneficiary services in FY 2026. The FY 2026 forecast is based on a model which uses prior payments to predict future spending. This model creates separate estimates for EN and VR payments using quarterly unemployment data from the Office of Management and Budget and TTW participation and beneficiary characteristics data from our administrative records through the Disability Analysis File. We also review various additional factors when budgeting, such as considering the possible impact of upcoming policy or business process changes on the budget and factor in any current trends in our spending.

In FY 2024, we discontinued the Consumer Directed Services (CDS) EN business model. CDS ENs reimbursed Ticketholders for purchasing services or products that assisted them in attaining and maintaining employment. After a lengthy quality review of the result of the business model, we determined that Ticketholders would be better served under ENs that provided traditional services such as resume writing and job coaching. Removing this business model led to a decrease in TTW payments in FY 2024 but in FYs 2025–2026, we expect the amount of TTW payments to increase from FY 2024 levels as we encourage Ticketholders to seek ENs providing traditional vocational rehabilitation and employment support services.

We reimburse VR agencies when payment claims are submitted within a 12-month period after a VR client completes their ninth month of SGA, for services that fall within the scope of reasonable and necessary services under the Rehabilitation Act of 1973 and Social Security regulations. We deny reimbursement claims when the VR services provided do not meet our criteria. We also deny payment when VR agencies are late in submitting reimbursement claims, or a VR client has not completed the required nine months of SGA, meaning the VR agency submitted the claim too soon.

During the COVID-19 pandemic, we relaxed a long-standing policy allowing only one appeal per denied claim. In FY 2024, we reinstituted this policy, resulting in an increase in denials and a decrease in VR payments. This also led to a decrease in VR claim submissions, as VR agencies are now waiting an extra quarter or two to submit their claims and appeals. The extra time increases the likelihood that we have evidence of earnings and that the claims will ultimately be payable.

In FY 2024, we also increased the number of pre-payment validation reviews (PVR) that we conduct on VR agencies. A PVR is a review of the documentation that supports the VR's request for reimbursement like receipts, case notes, Individualized Plans for Employment, etc. To maintain the integrity of our program, we increased the number of PVRs that we processed from approximately 100 in FY 2023 to 730 in FY 2024. As a result, we disallowed a larger percentage of claims for VRs that did not respond to the documentation request in its entirety or in a timely manner.

We expect VR claim submissions to increase as we work with VR agencies to ensure timely and accurate submission of payment claims and assist VR agencies that have had staffing changes. We have conducted a general cost reimbursement program training as well as a training on how to appropriately use claims data to submit claims requests. We are planning to offer additional training in FY 2025. We anticipate that these trainings will lead to an increase in the percentage of claims that are payable.

We continue our efforts to improve management and oversight of the VR cost reimbursement and TTW programs to ensure effectiveness. These efforts are solidified in the current EN agreements and include ongoing quality reviews of VR reimbursement claims and internal reviews of the agency's payment process.

Table 2.12—SSI VR Cost Reimbursement and Ticket to Work Payments[1]
($ in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate
Vocational Rehabilitation			
SSI Only Reimbursement Payments	5,558	7,027	7,273
SSI/DI Concurrent Reimbursement Payments	3,092	3,909	4,046
Total Reimbursement Awards	**8,650**	**10,936**	**11,319**
VR Obligations	**$90,504**	**$117,000**	**$121,000**
Ticket to Work			
SSI Only Milestone Payments	5,130	6,867	7,208
SSI Only Outcome Payments	23,195	31,050	32,590
SSI/DI Concurrent Milestone Payments	5,701	7,632	8,010
SSI/DI Concurrent Outcome Payments	7,418	9,930	10,423
Total Ticket Payments	**41,444**	**55,479**	**58,231**

[1] Totals may not add due to rounding.

Ticket Obligations	**$18,670**	**$23,000**	**$24,000**
Total VR Reimbursements & Ticket Payments	**50,094**	**66,415**	**69,550**
Total Obligations	**$109,174**	**$139,000**	**$145,000**

ADDITIONAL INFORMATION ON VR COST REIMBURSEMENT AND TICKET TO WORK PROGRAMS

Each VR may decide on a case-by-case basis whether to receive compensation under the VR cost reimbursement payment option or one of the two TTW payment methods described below. VRs have 90 days after they open a case (ticket assignment) to decide if they want to be reimbursed for their expenses under the Cost Reimbursement program or if they want to be paid under the TTW program. Regardless of the payment method the VR chooses, the beneficiary must have agreed to assign their Ticket with the VR for the agency to be eligible for either type of payment.

There are two TTW payment methods: Outcome-Milestone and Outcome-Only

Outcome-Milestone Payment Method:

- There are two phases of outcome-milestone payments. Phase I allows 4 payments, and Phase II allows 18 payments.
- We begin paying the EN when the recipient successfully achieves certain predetermined work-related milestones while still receiving Federal benefits.
- We stop paying milestone payments and begin outcome payments when the recipient's monthly Federal cash benefits are not payable because of work and earnings.

Outcome-Only Payment Method:

- Outcome payments are payable for a maximum of 60 months (consecutive or otherwise).
- We begin issuing monthly outcome payments after the individual's monthly Federal cash benefit payments cease and the individual earns above the SGA level in a month.
- The dollar amounts of the monthly outcome payments are larger when the EN elects not to receive milestone payments while the recipient still receives benefits.

When a VR provides services to a recipient under the Cost Reimbursement program, and the recipient later seeks support services from an EN, we may pay the VR and the EN for sequential periods of service. However, the EN is not eligible for Phase I Ticket payments since the VR would have provided initial services.

We continue to take steps to reduce overpayments incurred by all beneficiaries who work, such as enabling beneficiaries to report earnings and submit work activity reports online. SSI recipients may report earnings and submit paystubs through a mobile app. We are deploying a modernized system, the Payroll Information Exchange (PIE), to process DI work activity and reduce manual keying of data. With PIE, we obtain wage and employer information from a payroll data provider (PDP) for beneficiaries who give us authorization and whose employer participates in the PDP's services. PIE will reduce how much information participating beneficiaries need to report. TTW participants are subject to the same reporting requirements as all other beneficiaries, but have additional opportunities for training and reminders. For example, they often receive benefits counseling which explains how earnings affect their Social Security and other benefits, which includes reminders on the importance of reporting their earnings to SSA. Work Incentive Seminar Events teach participants about work incentives and the effects of work on benefits.

In FY 2023, we completed a study in response to a recent Government Accountability Office recommendation that SSA identify the root causes of overpayments to TTW participants and take appropriate actions as necessary.[1] We found that the underlying circumstances of TTW participants that result in overpayments are similar to those of non-participants, and that the root causes of overpayments resulting from work are the failure of TTW participants to report work and delays in the processing of work reports. With the implementation of PIE, we are attempting to directly address this root cause. We are working to reduce overpayments and improve the integrity of our programs. For information on our efforts to decrease overpayments, please see the Program Integrity and Improper Payment exhibits in the LAE section.

[1] See: Government Accountability Office. (2021). Social Security Disability: Ticket to Work Helped Some Participants, but Overpayments Increased Program Costs. (GAO Publication No. 22-104031). Washington, D.C.: U.S. Government Printing Office. https://www.gao.gov/products/GAO-22-104031.

RESEARCH AND DEMONSTRATION

Authorizing Legislation: Sections 1110 and 1144 of the Social Security Act.

PURPOSE AND METHOD OF OPERATION

We conduct extramural research, demonstrations, and outreach under Sections 1110 and 1144 of the Social Security Act (Act).

Table 2.13—Research and Demonstration Projects: Budget Authority and Obligations by Funding Authority[1]
(in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*Change from FY 2025 to FY 2026*
Appropriation[2]	$91,000	$91,000	$91,000	$0
Prior Year Unobligated Balance and Recoveries	$50,157	$43,211	$74,455	$31,244
Total Budgetary Resources	**$141,157**	**$134,211**	**$165,455**	**$31,244**
Obligations by Authority[3]				
FYs 2022-2024 Authority	$612	$0	$0	
FYs 2023-2025 Authority	$35,329	$1,857	$0	
FYs 2024-2026 Authority	$62,005	$28,995	$0	
FYs 2025-2027 Authority	N/A	$28,904	$62,096	
FYs 2026-2028 Requested Authority	N/A	N/A	$28,440	
No-Year Authority	$0	$0	$0	
TOTAL Obligations	**$97,946**	**$59,756**	**$90,536**	**$30,780**
Total Unobligated Balance	$43,211	$74,455	$74,919	$464

[1] This exhibit does not include narratives for projects that are using prior year funds.
[2] These amounts include $7,000,000 in base research funding classified as mandatory.
[3] We are authorized to expend research funds within three years of an enacted appropriation. We have a small balance of prior no-year funding authority that we are carrying over until expended. The FY 2025 and FY 2026 break out is our current projection for how the funds will be obligated.

Table 2.14—Research and Demonstration Projects: Obligations by Funding Source
(in thousands)

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate
Obligations by Source			
Section 1110	$96,723	$58,035	$88,815
Section 1144	$1,223	$1,721	$1,721
TOTAL Obligations	**$97,946**	**$59,756**	**$90,536**

Section 1110 of the Act authorizes the Commissioner of Social Security to conduct broad, cross-programmatic projects for the Old-Age, Survivors, and Disability (OASDI) and Supplemental Security Income (SSI) programs. This section provides for waiver authorities for the SSI program, as well as projects dealing with specific SSI issues. Under Section 1110, we fund a range of extramural projects: disability and retirement policy research, demonstration projects to test creative and effective ways to promote greater labor force participation among people with disabilities, evaluations of proposed or newly enacted legislative changes, and projects to maintain and improve basic data about our programs and beneficiaries.

We currently fund a range of Section 1110 projects designed to:

- Help us keep pace with advancements in medicine and technology;
- Modernize our vocational rules;
- Test work support models;
- Gauge the public's understanding of the program; and
- Measure the impact of program changes.

Section 1144 requires us to conduct outreach to individuals with Medicare who are potentially eligible for State-administered Medicaid programs or Medicare prescription drug subsidies under Medicare Part D. We identify these potential beneficiaries, inform them about these programs, and notify State Medicaid agencies. The Centers for Medicare & Medicaid Services, within the Department of Health and Human Services (HHS), oversee both the Medicare and Medicaid programs.

We are committed to safeguarding the personal information that has been entrusted to us and protecting individuals' privacy. Our use of data for research and analysis is governed by a number of laws and regulations, including the Social Security Act, the Privacy Act of 1974, the E-Government Act of 2002, and related rules and regulations from the Census Bureau and the Internal Revenue Service.

RATIONALE FOR BUDGET REQUEST

We are committed to improving the quality, consistency, and timeliness of our disability decisions; maximizing efficiencies throughout the disability program; and enhancing employment support programs to create new opportunities for returning beneficiaries to the workforce. Our research activities are critical to our efforts in all three areas.

We are reassessing all extramural research, demonstration, and outreach initiatives to better align with the President's Executive Orders (EO) and Administration guidance to improve service delivery, fight potential fraud and waste, and improve payment integrity. In support of this effort, we have scaled back some of our research and demonstration commitments in FY 2025.

In FY 2026, we are requesting $91 million in new budget authority for traditional research activities under Sections 1110 and 1144.

Section 1110 funds must be spent on contracts or grants conducting research related to: 1) preventing or reducing program dependency; 2) coordinating the planning between welfare agencies; and 3) improving the administration and effectiveness of Social Security Act and related programs. We will reorient our focus to initiate in-house research on service delivery and program outcomes.

The table and discussion that follow provide more details on the research and outreach efforts we plan to fund in FY 2026.

Table 2.15—Major Research Areas, Demonstration Obligations and New Budget Authority[1]
(in thousands)

Major Research Areas	Obligations[2]		
	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate
Advisory Services to Assist SSA with Disability Issues	$2,714	$3,945	$4,044
Analyzing Relationships between Disability, Rehabilitation, and Work (ARDRAW)	$900	$0	$0
Behavioral Insights Studies	$0	$0	$0
Beyond Benefits Study	$0	$394	$0
Blanket Purchase Agreement for Time-Sensitive Research Projects	$605	$1,700	$2,000
Census Surveys	$750	$765	$780
Data Development	$106	$104	$104
Data Development in an Enterprise Business Intelligence (EBI) Platform	$2,000	$2,000	$2,000
Disability Analysis File (DAF)	$1,297	$0	$0
Disability Research Survey (DRS)	$11,285	$0	$0
Health & Retirement Study (HRS) and Supplement	$4,575	$4,575	$4,575

[1] Totals may not add due to rounding.
[2] This amount includes obligations funded from prior-year unobligated balances.

Supplemental Security Income Program

Major Research Areas	Obligations[2]		
	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate
Interventional Cooperative Agreement Program (ICAP)	$4,574	$0	$0
Medicare Outreach (1144)	$1,223	$1,721	$1,721
National Institutes of Health Research on Data Analytics and the Functional Assessment Battery Development	$4,595	$0	$0
New and Emerging Research	$659	$750	$32,000
Occupational Information Systems (OIS) and Vocational Information Tool (VIT)	$34,253	$38,800	$37,610
Retirement and Disability Research Consortium (RDRC)	$16,801	$0	$0
SSI Outreach Evaluation	$6,609	$0	$0
Understanding America Study (UAS) Enhancements	$5,000	$5,002	$5,702
Total Research Obligations	**$97,946**	**$59,756**	**$90,536**
New Budget Authority	**$91,000**	**$91,000**	**$91,000**

Updates on Projects with Funding Requested

<u>Advisory Services to Assist SSA with Disability Projects/National Academy of Sciences Multi-Year Contract</u>

In FY 2023, we awarded a new five-year contract with the National Academies of Sciences' Health and Medicine Division (NAS-HMD) to conduct research and answer specific questions related to medical and vocational assessment at steps three, four, and five of the sequential disability evaluation process. Information from HMD ensures our disability evaluations reflect the latest knowledge and practice in a wide range of medical disciplines and supports data-driven changes to our regulations and policies. The contract provides for Federal Advisory Committee Act-compliant Consensus Committees of medical and other experts to evaluate the effectiveness of our disability programs for adults and children as well as organize and lead workshops with subject matter experts and outreach conferences with members of the public.

In FY 2025, we are pursuing the award of task orders to:

- Create a consensus committee on the newest findings regarding recovery and prognosis after Traumatic Brain Injury (TBI) including those medically classified as "mild TBI," such as concussions. This information will enable us to provide adjudicators with updated guidance for comprehensively assessing a claimant's experiences and limitations from TBI with a focus on the long-term and secondary effects that persist after recovery from acute injury.

- Create a consensus committee to explore the medical community's current standards and best practices for pulmonary function testing (PFT). The committee will be directed to examine the practical reality of testing procedures in average primary care and specialist offices. This information will allow us to assure our PFT requirements comport with the reality encountered by the individuals served by our program. Based on the committee's findings, we can make updates to current PFT policy requirements to maintain program accuracy while increasing the efficiency of evidence collection by aligning the supporting information we ask for with the testing capabilities and evaluations performed by a wider scope of medical providers.

- Plan and conduct a public workshop comprised of healthcare experts, medical practitioners, and computing and information technology professionals to discuss the identification, and interpretation of Artificial Intelligence-generated, enhanced, or edited medical evident records. This workshop will help us understand how to make the best possible use of the evidence we receive from increasingly complex medical record systems containing information with provenance outside the traditional paradigm of direct recording by a medical practitioner.

In FY 2026, we will support Administration priorities with envisioned task orders to:

- Create a consensus committee investigating medical devices and their growing use, availability, prevalence, and efficacy in the treatment of various conditions. The committee's findings will support improvements in our disability programs as it will help us consider how to best collect evidence directly from medical devices and the accuracy and reliability of such evidence in our adjudication process.

- Create a consensus committee to discuss the evolving landscape of telemedicine and identify best practices with respect to remote testing or examination. The collected information would help refine our consultative examination guidelines, helping us take first steps towards formulating new processes to lower the time and monetary burden on patients and SSA to gather medical evidence sufficient to allow adjudication of claims while protecting the funds entrusted to us by the U.S. taxpayer.

- Plan and conduct a public workshop comprised of health care and allied professionals to discuss case prognosis and progression in physical or occupational therapy and how care decisions are made. This workshop will help us understand the drivers behind differences in therapy records and functional reports between claimants with similar underlying impairments, allowing for improvements in decisional efficiency and accuracy, particularly with respect to identifying individuals who, with the support of rehabilitation therapy, have regained their capacity for gainful employment

Blanket Purchase Agreement (BPA) for Time-Sensitive Research Projects

Early in FY 2024, we awarded a 5-year BPA to allow us to quickly award multiple research projects simultaneously to support policy and program assessments and studies related to social science, medical, or vocational rehabilitation topics. The BPA will produce research papers, evidence, and relevant data analysis informed by our researchers' expertise and content knowledge.

Supplemental Security Income Program

In FY 2025, we are planning BPA awards for the following research topics:

- Program Data Quality Rules – to develop quality assurance and control standards based on the data quality framework of the Federal Committee on Statistical Methods and consistency with the Foundations for Evidence-Based Policymaking Act of 2018 (Evidence Act) requirements. These rules govern how statistical micro and macro data products may be shared with non-SSA colleagues or disseminated to the public (e.g., summary statistics, charts, public use files) along with relevant documentation consistent with metadata standards, to include cover data utility, objectivity, and integrity as well as metadata documentation for public release and archiving.

- Analysis of the Mental Requirements for Wave 2 of the Occupational Requirements Survey (ORS) – to update the mental and cognitive demands of unskilled work in the national economy based on the ORS and other Federal sources of occupational information as part of a new Occupational Information System (OIS). The OIS will use the Standard Occupational Classification (SOC) system for classifying occupations. Given the long-term investment in the ORS, we will continue working with the Department of Labor's Bureau of Labor Statistics (BLS) to identify lower-cost options for ongoing survey production.

In FY 2026:

- Program Data Disclosure Review – to evaluate the effectiveness of privacy-preserving techniques currently in place and expand the disclosure protection rules across micro and macro data towards strengthening the privacy protection protocols. We will strengthen privacy guidance via the use of the developed rules to guide disclosure review work throughout our review process covering all possible privacy and disclosure rules. This is an effort to support the Evidence Act.

Census Bureau Surveys

We will continue our partnership with the Census Bureau to match Census data to our administrative data on benefits and earnings. We rely upon Census data from Census surveys matched to our records to study OASI, DI, SSI, and related programs and to analyze the effect of changes to our programs on individuals, the economy, and program solvency.

Data Development

One of the main objectives of our extramural research program is to provide information for decision-makers on the OASI, DI, and SSI programs. We develop and maintain a series of detailed, statistical databases drawn from our major administrative data systems and prepare a broad range of statistical tables. We also prepare and publish statistical and research products and develop internal information for research, evaluation, and modeling that uses survey data collected by our agency, other Federal agencies, and federally sponsored institutions.

In FY 2021, we entered into a new agreement with the Census Bureau for the "Ask US" Panel (i.e., Census Address-and Probability-Based Online Panel). The focus of the interagency agreement is to collaborate on an address-based, probability-based, online research panel that will be available for the Federal Statistical System to conduct robust public opinion and methodological research. The Census Bureau has entered into a cooperative agreement with RTI International to build this panel. In FYs 2023–2025, we supported the Census Bureau's efforts to implement and use the panel. Our partnership will facilitate longitudinal probability-based research that many Government agencies are interested in conducting.

<u>Data Development in an Enterprise Business Intelligence (EBI) Platform</u>

EBI provides advanced analytics and data integration tools for efficient access and analysis of our records to support data-driven decision making. Section 1110 funds support a subset of activities to enhance research and statistical functions, primarily publishing statistics from administrative records.

We generate reports and data files monthly, quarterly, yearly, and on an *ad hoc* basis. Some of the legacy systems we use for producing statistics still require significant manual intervention. We are improving the report and data production efficiency and accuracy by modernizing and automating the application processes that we use to create statistical data, tables, and reports for research.

In FY 2025, we are working on the Modernization of Statistical Publication Processes, including upgrading, testing, and migrating OASDI, SSI, and earnings-related tasks with SharePoint and Z Multi-Factor Authentication updates.

In FY 2026, we will strengthen the integrity of our research and statistical reports by:

- Maintaining and upgrading software for the publication of OASDI and SSI data;
- Maintaining and upgrading software for the publication of Earnings Geography, Earnings Publications, and Representative Payee data; and
- Incorporating enhanced EBI tools to support the production of statistics or data extracts for ongoing publications and critical, ad hoc research projects.

<u>Health and Retirement Study (HRS) and Supplement</u>

The University of Michigan's HRS surveys more than 22,000 Americans over the age of 50 every two years and provides an ongoing source of longitudinal data for research on retirement and aging. The study provides data on health and economic well-being after retirement not available in our program data. HRS data helps us assess a wide range of issues, including Income of the Aged Population, preretirement savings and pension participation, health insurance, employment and retirement patterns, and projected benefits of disabled and retired workers. We use this data to inform research by our staff on disability and retirement income resources of near-retirees. Through jointly financed cooperative agreements with the National Institute on Aging, we have supported the HRS from its inception.

The HRS data we support are also available for external researchers to understand the American population aged 50 and older.

Medicare Outreach – Section 1144

We are required to send outreach letters to income-tested, Medicare-eligible beneficiaries and those who have experienced a decrease in income.[1] These letters provide help with "traditional" Medicare and include information about Extra Help, when appropriate.

We annually notify 20 percent of those who previously received an outreach letter, have not received the benefits, and meet the income test. In FY 2024, we mailed approximately 1.3 million outreach letters to those who potentially qualified for the Medicare Savings Program or Extra Help. In FYs 2025–2027, we anticipate mailing a similar number of outreach letters each year. We factor in a contingency amount for possible increases in enrollment, for beneficiaries who experience a decrease in income, and other expected costs such as an increase in postage.

In addition, we share lists of individuals potentially eligible for cost sharing with State Medicaid agencies. The major objective of these projects is to increase the enrollment of eligible low-income individuals into programs that assist Medicare beneficiaries with their out-of-pocket medical expenses, including prescription drug coverage premiums. HHS fully reimburses our costs in an amount not exceeding $3 million per year.

New and Emerging Research

Given the size and scope of our research agenda, this category allows us the flexibility to cover unanticipated cost increases and the development of new research projects to respond to changes in laws, regulations, policy, and agency or Administration priorities. We anticipate using this funding for new research to support operational activities that support the Administration's priorities of improving customer service, fighting potential fraud and waste, and optimizing our workforce.

New and Emerging Research covers the costs of small initiatives or initial project development for larger initiatives. Larger, multi-year initiatives receive their own funding in future budget planning depending on project scope, duration, and cost.

Occupational Information System (OIS) and Vocational Information Tool (VIT)

We are collaborating with the Department of Labor's BLS on development of the ORS to collect updated information on the requirements of work in the national economy. We will use the ORS data, along with information from other occupational sources, to create the OIS.

The OIS will classify occupations using the Federally mandated Standard Occupational Classification system and include data elements to measure the physical demands, environmental conditions, and mental and cognitive requirements of work, as well as the education and training

[1] The Medicare Prescription Drug, Modernization, and Improvement Act of 2003, P.L. 108-173 expanded outreach requirements of Section 1144. The Medicare Improvements for Patients and Providers Act of 2008, P.L. 110-275 deemed every Extra Help application filed with our agency to be a protective filing for the State-administered Medicare Savings Program, unless the claimant objects.

needed to gain average proficiency in a job. We will house, access, and operationalize the OIS through the VIT, a web-based information technology platform.

BLS determined that a five-year cycle ("Wave") of data collection is needed for ORS to remain current with changes in the occupational environment. In 2024, BLS published the ORS Wave 2 final data estimates, which we will use to conduct rulemaking. We plan to update our disability adjudication rules over time to keep up to date with new BLS data.

We are descoping our interagency agreement with BLS to reduce project costs while fulfilling our data needs. We will document a new framework in the upcoming ORS Program Development Plan, a long-term planning document that outlines development activities and timelines for overarching ORS objectives. In FYs 2025-2026, BLS will continue to collect data and publish preliminary estimates for Wave 3.

Understanding America Study (UAS) Enhancements

UAS is an innovative, nationally representative longitudinal internet panel with a sample of approximately 14,000 households. Our jointly financed cooperative agreement with the National Institute on Aging funds the grant awarded to the University of Southern California (USC) to conduct the study. UAS has helped us understand variability in retirement- and disability-related outcomes across the population. Over the last year, SSA has used this data to improve the online version of the SSA Statement and examine and brief SSA leadership about the public's knowledge of SSA programs and channel preferences.

In FY 2025, we are currently developing tables of results from the retirement and disability Social Security surveys and use the longitudinal data to assess whether the *Social Security Statement* and supplemental fact sheets improve the public's understanding of our programs. We will also evaluate longitudinal data on the public's Social Security retirement program knowledge, disability program knowledge, and communication channels preferences. We will disseminate the results of our work online and by sharing with interested internal and external stakeholders working on service delivery and public communications.

In FY 2026, we will conduct research to better understand individuals' decision-making about when and whether to file for benefits.

Updates on Projects with No Funding Requested

In FY 2025, we cancelled several projects to better align our research and demonstration projects with Administration priorities on statutorily required activities. By the end of FY 2025, we expect to complete all required closeout activities on the following projects:

Analyzing Relationships between Disability, Rehabilitation, and Work (ARDRAW)

The ARDRAW program supported young and emerging scholars pursuing careers in public policy research who had a special interest in our beneficiaries' quality of life and disability program issues, challenges, and outcomes. In FY 2024, we conducted a competition for the program management organization and awarded it to the Board of Regents of the University of Wisconsin System. In FY 2025, we cancelled the cooperative agreement with the Board of Regents of the University of Wisconsin System.

Beyond Benefits Study

In FY 2021, we awarded a contract to collect information about the service, medical, and employment needs of working-age adults (i.e., 18 to 64 years of age) exiting Social Security disability programs because of medical improvement, including age-18 redeterminations.

In FY 2024, we began qualitative data collection in the form of a small pilot with 50 participants. We used this data to develop a survey about the needs of beneficiaries who may lose disability benefits or former beneficiaries who no longer collect disability payments. In FY 2024, we completed all data collections (qualitative interviews and focus groups), fielded a national survey to 4,000 individuals, and completed the Motivational Interviewing Pilot. In FY 2025, we will receive data files and end the project.

Disability Analysis File (DAF)

The DAF took data from 10 administrative files and created an annual database. The DAF focused on data needed to answer questions about disability and work.

We used the DAF for internal research on return-to-work issues, and to support demonstration development and evaluation. We awarded a competitive contract in FY 2022 to continue building the DAF over FYs 2022–2026. DAF 2021 and DAF 2022 were completed in FYs 2023 and 2024, respectively. In FY 2025, we ended the contract with the vendor; DAF 2023 was mostly complete at the time of contract termination, with data available from demographics research, annual benefits, and the Ticket to Work files, while documentation files and validation reports for DAF 2023 were pending completion. We are no longer planning to fund a DAF 2024, DAF 2025, and DAF 2026.

Disability Research Surveys (DRS)

In FY 2021, we developed the DRS to broaden the scope of information we collect about beneficiaries. We awarded the DRS in FY 2022 to three separate surveys: the National Beneficiary Survey (NBS), the New Applicant Survey (NAS), and a survey of children and young adults who were current or former SSI recipients. In FY 2025, we terminated the contract with the vendor.

The NBS was fielded in FY 2023, and we received the NBS survey and restricted use data file in FY 2025. In FYs 2023-2024, we developed the NAS but terminated the DRS contract prior to the planned FY 2025 data collection. In FYs 2024-2025, we were developing the survey instruments for the third survey on children and youth before DRS contract termination.

Interventional Cooperative Agreement Program (ICAP)

Under ICAP, we reviewed demonstration proposals from outside organizations and entered into cooperative agreements to collaborate with non-Federal entities on demonstration research related to program efficiencies and self-sufficiency.

In FY 2024, we began implementation, enrollment, and evaluation activities for the initial two ICAP projects awarded in 2021, the Vocational Resource Facilitator Demonstration (VRFD) and the SOAR in Georgia County Jails Pilot (SGCJP). We completed start up for the second round of ICAP projects, the Youth Transition Exploration Demonstration (YTED) and the Supportive Housing and Individual Placement and Support (SHIPS) study. In FY 2025, we will continue implementation, enrollment, and evaluation activities for VRFD, SGCJP, SHIPS, and YTED.

We will not solicit for additional projects in FY 2025.

Retirement and Disability Research Consortium (RDRC)

We awarded the current set of five-year cooperative agreements for the RDRC at the end of FY 2023. The RDRC was comprised of six competitively selected research centers that were charged with planning, initiating, and maintaining a multidisciplinary research program that covered retirement, disability, and Social Security program issues.

In FY 2024, we outlined funding to support projects starting in FY 2025. In FY 2025, we terminated the grant with the six RDRC centers.

SSI Outreach Evaluation

In FY 2024, we awarded an evaluation contract to assess the effectiveness of the SSI Outreach efforts. In FY 2025, we terminated the contract with the vendor to better align our research projects with Administration priorities.

RELATED FUNDING SOURCES

Section 234 of the Social Security Act gave us the authority to use trust fund monies to conduct research and demonstration projects designed to test DI program changes that may encourage disabled beneficiaries to work. Congress extended this authority with the Ticket to Work and Work Incentives Improvement Act of 1999 and the Bipartisan Budget Act of 2015. These demonstration projects were not part of our annual research appropriation request. OMB apportions Section 234 funds. Our authority to initiate such projects ended December 31, 2021, and to carry out such projects ended December 31, 2022. We will not incur additional costs, but for some projects, such as the Ohio Direct Referral Demonstration, we will continue to analyze data and release evaluation reports.

Demonstrations help identify the effects of policy changes before they are enacted nationally or in ways that are difficult to repeal if they do not have the intended effects. For example, in prior years, we used Section 234 authority to test alternative post-entitlement policies that offset DI benefits by $1 for every $2 earned, rather than the current "cash cliff" when beneficiaries lose all benefits. These tests (the Benefit Offset National Demonstration and the Promoting Opportunity Demonstration) showed that implementing such a policy would not induce enough beneficiaries to work to reduce DI Trust Fund outlays. Had these policies been enacted without the test, SSA would have incurred substantial expenses related to systems, trainings, new regulations, and other areas for an ineffective program.

Table 2.16—Current Research Projects Obligations through FY 2024
(in thousands)

Current Research Project Obligations	Years	Total
Advisory Services to Assist SSA with Disability Issues	2008-2024	$43,212
Analyzing Relationships between Disability, Rehabilitation and Work: A Small Grant Program (ARDRAW)	2016-2021 / 2024	$2,900
Beyond Benefits Study	2021-2024	$2,877
Blanket Purchase Agreement for Time Sensitive Research Projects	2018-2024	$7,884
Census Surveys	2008-2024	$12,750
Data Development[1]	2008-2024	$1,536
Data Development in an Enterprise Business Platform	2015-2024	$17,449
Disability Analysis File	2008-2024	$20,697
Disability Research Surveys	2022 / 2024	$24,498
Health and Retirement Study (HRS) and Supplement	2008-2024	$70,542
Interventional Cooperative Agreement Program	2021-2024	$21,055
Medicare Outreach (1144)	2008-2024	$30,731
National Institutes of Health – Research on Data Analytics/Functional Assessment Battery Development	2008-2024	$45,946
New and Emerging Research	2024	$7,921
Occupational Information System and Vocational Info Tool	2012-2024	$307,007
Retirement and Disability Research Consortium[2]	2008-2024	$171,826
SSI Outreach Evaluation	2024	$6,609
Understanding America Survey	2009-2024	$35,698
Total Section 1110 and 1144 Obligations		**$831,138**

ADMINISTRATION OF OUR RESEARCH ACTIVITIES

Our research components are housed across the Office of Law and Policy (OLP) and the Office of the Chief Information Officer (OCIO).

OLP is responsible for activities in the areas of strategic and program policy planning, policy research and evaluation, and overall policy development, analysis, and implementation. Within

[1] The Data Development line reflects total obligations for current research projects.
[2] The Disability and Research Consortium (DRC) and the Retirement Research Consortium (RRC) were separate grant programs until FY 2017.

OLP, the Office of Disability Policy (ODP) is responsible for administering projects funded under our research appropriation.

ODP oversees and supports the planning, development, evaluation, and issuance of substantive regulations, policies, and procedures for our disability programs; development and promulgation of policies and guidelines for use by State, Federal, or private contractor providers who implement the disability provisions of the Social Security Act; and evaluation of the effects of proposed legislation and legislation pending before Congress to determine the impact on disability programs. ODP uses research to identify opportunities for policy improvement and for keeping medical, vocational, childhood, disability, and continuing disability review policies up to date. ODP also conducts research, demonstrations, analyses, evaluations, and statistical modeling that support our goals to improve disability program effectiveness and efficiency and reduce dependence on disability programs.

OCIO is responsible for all major Evidence Act-related activities both for strategic planning and implementation. Within OCIO, the Office of the Chief Data Officer (CDO) is responsible for leading the strategy and setting standards across data governance and all Evidence Act-related responsibilities, while the Office of Analytics and Improvements (OAI) is responsible for implementing these standards and responsibilities pertaining to the recognized statistical unit leading statistical publications and research.

The CDO is responsible for the provision of governed and trusted data to improve agency outcomes and facilitate data-driven decision making. Driven by the Evidence Act, the office of the CDO is responsible for managing information around the data lifecycle to enable quality, accuracy, access, and protection of data. The CDO is the main point of contact for coordinating with any official in the agency responsible for using, protecting, disseminating, and generating data to ensure that the data needs of the agency are met.

OAI is responsible for the production and dissemination of data and analysis regarding our programs and operations. OAI produces findings on our retirement, disability, and SSI programs from research and analysis projects, working in collaboration with our Policy and Operations components. OAI maintains a schedule of statistical publications to meet statutory reporting requirements. OAI statisticians and analysts provide reliable data about our key program variables, information about the design of social insurance programs around the world to support comparative research, as well as evaluation research related to our programs and their outcomes. As a principal analysis unit of the agency, OAI, develops program and survey data to support our research and statistical objectives.

Implementation of the Evidence Act

The *Foundations for Evidence-Based Policymaking Act (Evidence Act) of 2018* requires us to issue an FY 2026 Annual Evaluation Plan. SSA's Evaluation Officer is responsible for coordinating across the agency to develop and execute on this plan. For more information on our implementation of the Evidence Act, please see documents posted on https://www.ssa.gov/evidence/.

RESEARCH INVESTMENT CRITERIA

We support research that helps us better understand our administrative processes, rules, and policies and the impact they have on beneficiaries, solvency, and program operations and outcomes. Our research also informs many of the priority questions identified in our Evidence Act documents. Within this framework, our extramural research program places the best available evidence into the hands of policymakers to inform policy development and program administration. We have established guidelines for developing, managing, and vetting projects for inclusion in our research and demonstration agenda, such as presented in our 2026 Annual Evaluation Plan and solicitations to deliver on these plans. We employ a variety of methods to ensure we meet the funding requirements of the sections of the Act that authorize our extramural research and demonstration activities, and our extramural research activities meet high standards for relevance, quality, and performance.

Relevance

The primary purpose of our extramural research is to support evidence-building to inform the improvement of our programs. A fundamental step in our review is assuring that each project responds to issues facing the OASDI and/or SSI programs, with priority towards contemporaneous challenges. Our research supports the Evidence Act and the priorities of this Administration.

Our review process includes obtaining the advice and recommendations of policymakers and researchers with technical expertise, program managers, and agency executives. Internal reviews help ensure that funded activities reflect our strategic goals and objectives and respond to legislative requirements and the priorities of the Administration. We participate in cross-agency working groups, as appropriate, to identify appropriate areas of collaboration, data sharing, and policy change.

Many of our research activities provide policymakers and agency executives with the analytical and data resources they need to assess our current programs and the implications of reform proposals. Our budget request reflects our support of the ongoing Administration goals to minimize reliance on our disability programs through increased work and improve operational efficiency.

Quality

We use a competitive, merit-based, peer-reviewed procurement process to ensure that our extramural research program selects the best qualified individuals and techniques to produce high quality results. We award research projects conducted by private-sector organizations through competitive contracts, grants, or cooperative agreements. We are ensuring our full compliance with new Federal policies, including EO , and *EO 14271, Ensuring Commercial, Cost Effective Solutions in Federal Contracts*.

We use Technical Expert Panels prior to beginning projects and Technical Working Groups during project implementation to review projects and to provide feedback and suggestions for improvement to the agency. These panels include internal experts in relevant disciplines, such as statistics, economics, and survey design. They help ensure that our sponsored research projects are methodologically sound and consistent with professional standards.

Performance

We carry out our extramural research and evaluation projects primarily through contracts and jointly funded cooperative agreements that identify specific deliverables and timetables. We have sent a strong message to contractors that they must complete projects on time and within budget. Contracting officers, contracting officer's representatives, analysts, and senior executives monitor the progress of all research contracts and agreements. These agreements are also subject to audits by the Office of the Inspector General.

Consistent with our encouragement to support evidence-based evaluations, we produce reports and data files for each research and evaluation project to determine whether existing or proposed programs work as designed. Where appropriate, we make these reports publicly available or announce their availability in the *Social Security Bulletin* and online.

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AUTHORIZING LEGISLATION

The Limitation on Administrative Expenses (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)

	2024 Amount Authorized	2024 Enacted[1,2]	2025 Amount Authorized	2025 Enacted[3,4]	2026 Amount Authorized	2026 Estimate[5,6]
Title II, Section 201(g)(1) of the Social Security Act	Indefinite	$14,226,978	Indefinite	$14,298,978	Indefinite	$14,792,978

[1] Further Consolidated Appropriations Act, 2024 (P.L. 118-47). The total includes $1,851,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical Continuing Disability Reviews (CDR), work CDRs, Continuing Disability Investigation (CDI) units, and the prosecution of fraud by Special Assistant United States Attorneys (SAUSA), comprised of $273,000,000 in base funding and a $1,578,000,000 allocation adjustment to remain available for 18 months through March 31, 2025. P.L. 118-47 allows us to transfer up to $15,100,000 of program integrity funds from the LAE account to the Office of the Inspector General (OIG) for the costs associated with jointly operated CDI units.

[2] The total also includes $150,000,000 for Supplemental Security Income (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 (SSPA).

[3] Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4). The total includes $1,903,000,000 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 $1,630,000,000 allocation adjustment to remain available for 18 months through March 31, 2026. P.L. 119-4 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.

[4] The total also includes $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.

[5] The FY 2026 Budget includes $2,397,000,000 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 $2,124,000,000 allocation adjustment, to remain available until March 31, 2027. The Budget includes transferring $24,600,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units.

[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 two passenger motor vehicles, and not to exceed $20,000 for official reception and representation expenses, not more than $14,621,978,000 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 unobligated balances of funds provided under this paragraph at the end of fiscal year 2026 not needed for fiscal year 2026 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: 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: 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 under this heading, not more than $2,397,000,000, to remain available through March 31, 2027, 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 and $2,124,000,000 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, $24,600,000 shall be transferred to the "Office of Inspector General", Social Security Administration, 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.*

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 2026 exceed $170,000,000, the amounts shall be available in fiscal year 2027 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—This account is operating under the Full-Year Continuing Appropriations and Extensions Act, 2025 (Division A of Public Law 119-4).

LANGUAGE ANALYSIS

The Limitation on Administrative Expenses (LAE) appropriation language provides SSA with $14,792,978,000 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.

The American public depends on SSA to deliver timely and accurate Social Security services, and our request allows us to carry over unobligated balances for non-payroll automation and telecommunications investment costs in future fiscal years so that we can enhance our technology to improve customer service and reduce customer wait times.

SSA has a responsibility to safeguard the integrity of benefit programs, and we are requesting a total of $2,397,000,000 in dedicated program integrity funding, including funding for full medical Continuing Disability Reviews (CDR), SSI non-medical redeterminations of eligibility (redeterminations), work-related CDRs, CDR appeals workloads, cooperative disability investigation (CDI) units, and fraud prosecutions by Special Assistant United States Attorneys (SAUSAs). Our FY 2026 program integrity request is comprised of $273,000,000 in base funding to meet the terms of the Balanced Budget and Emergency Deficit Control Act of 1985, as amended, and a $2,124,000,000 adjustment. In FY 2026, SSA may transfer up to $24,600,000 from the adjustment funds to the Office of Inspector General (OIG) for the costs associated with jointly operated CDI units. This is an authorized use of the adjustment.

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
"For necessary expenses, including the hire and purchase of two passenger motor vehicles, and not to exceed $20,000 for official reception and representation expenses, not more than $14,621,978,000 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."	The language allows us to rent or purchase two passenger vehicles for official use and limits spending for hosted events or gatherings intended to promote the agency's mission to distinguished guests to no more than $20,000. It also provides the annual appropriation for program administration, financed from the Social Security and Medicare trust funds and the General fund in accordance with section 201(g) of the Social Security Act.

Limitation on Administrative Expenses

Language Provision	Explanation
"Provided, That unobligated balances of funds provided under this paragraph at the end of fiscal year 2026 not needed for fiscal year 2026 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: 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…"	The language allows us to carryover unobligated balances for non-payroll automation and telecommunications investment costs in future fiscal years.
"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."	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.
"From funds provided under the first paragraph under this heading, not more than $2,397,000,000, to remain available through March 31, 2027, 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	The language appropriates $2,397,000,000 for dedicated program integrity funding, to remain available through March 31, 2027, for full medical CDRs, redeterminations, work-related CDRs, CDI units, and fraud prosecutions by SAUSAs. The language transfers $24,600,000 from the program integrity adjustment to the OIG to fund CDI unit activities. Additionally, this language prohibits the transfer or reprogramming of program integrity funding, except for the $24,600,000 transfer to OIG. For additional

Language Provision	Explanation
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 and $2,124,000,000 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, $24,600,000 shall be transferred to the "Office of Inspector General", Social Security Administration, 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."	information, please refer to the Program Integrity section.
"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 2026 exceed $170,000,000, the amounts shall be available	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 $15.22 per check in FY 2025 to $15.60 in FY 2026 according to increases established by statute. We receive the amount collected above $5.00 from each fee.

Limitation on Administrative Expenses

Language Provision	Explanation
in fiscal year 2027 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."	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.

SIGNIFICANT ITEMS IN APPROPRIATIONS COMMITTEE REPORTS

The Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4) did not include a joint explanatory statement or report in conjunction with the enacted appropriation. We fulfilled all reporting requirements as requested in the explanatory statement accompanying the Further Consolidated Appropriations Act, 2024 (P.L. 118-47), and consistent with Senate Report 118-84.

IMPROPER PAYMENTS AND ANTI-FRAUD

We take seriously our responsibilities to protect Social Security and to ensure eligible individuals receive the benefits to which they are entitled. Our internal quality reviews, validated by a third-party auditor, indicate that our FY 2023 Old-Age, Survivors, and Disability Insurance (OASDI) benefit payments were 99.76 percent free of overpayments and 99.94 percent free of underpayments.[1] For the same year, 90.82 percent of all Supplemental Security Income (SSI) payments were free of overpayment and 98.56 percent were free of underpayment.[2] FY 2024 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 2023, we issued about $1.4 trillion in benefit payments, and our projected combined improper payments totaled $4.1 billion for OASDI and $6.5 billion for SSI.

We are committed to stewardship of taxpayer resources and improving the integrity of our programs by reducing improper payments through efforts such as targeting the root causes directly, streamlining our policies and procedures, automating our business processes, leveraging data through exchanges with Federal, State, and private partners, performing quality reviews, and conducting employee training. We are also simplifying our notices and increasing our communication with the public about how people can prevent improper payments, including reminders about reporting responsibilities.

We safeguard the integrity of our programs by efficiently and effectively preventing, detecting, deterring, and mitigating fraud and improper payments. We administer our anti-fraud program and improper payment initiatives and support the Office of the Inspector General's (OIG) efforts to investigate fraud, develop consistent anti-fraud policies and processes, formulate anti-fraud initiatives, and align anti-fraud efforts with industry standards.

For additional information about our payment accuracy, root cause of improper payments, and efforts we are taking to improve payment accuracy, please refer to the Program Integrity exhibit, our Annual Performance Report, our Agency Financial Report, and PaymentAccuracy.gov.

IMPROPER PAYMENT REDUCTION EFFORTS

Electronic Wage Reporting

Wages are a leading cause of improper payments in the DI and SSI programs, because both programs rely on beneficiaries and recipients to report changes to their wage and employment information. Despite reporting requirements, beneficiaries and recipients do not always report or report timely, which leads to improper payments.[3] To combat these payment errors, we implemented the Payroll Information Exchange (PIE). PIE is an automated method of collecting wage and employment information from payroll providers. For those who provide authorization,

[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.

[3] For DI, improper payments are generally due to work at Substantial Gainful Activity levels; for SSI, improper payments are largely due to wages contributing to countable income and related payment errors.

PIE reduces customer burden to report wage information and lessens the time our technicians spend obtaining and verifying wage data. On April 7, 2025, we began the phased implementation of PIE with an initial exchange of 1 million Social Security numbers. We will gradually increase the exchanges each month until reaching full implementation of the authorized population by September 2025. With implementation, we began receiving individuals' wage data directly from payroll providers and are using that data to adjust SSI benefits timely and flag DI records potentially requiring work reviews. Because PIE does not eliminate the need for beneficiary and recipient reporting in all cases, we continue to offer electronic wage reporting options to facilitate efficient self-reporting of wages. We built several reporting channels: the myWageReport online application, the automated SSI Telephone Wage Reporting system, and the SSA Mobile Wage Reporting application. Individuals can sign up to receive a text message or email reminder to report their prior month's wages. To promote the use of online wage-reporting applications, in FYs 2024 and 2025, we posted videos on wage reporting mechanisms on YouTube, Facebook, and Social Security TV in field office reception areas.

Social Security Fairness Act

On January 5, 2025, the *Social Security Fairness Act (SSFA) of 2023* was signed into law, repealing the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO). WEP and GPO reduced or offset Social Security benefits for beneficiaries who received a pension based on non-covered earnings. WEP and GPO no longer apply to benefits payable for months after December 2023. Errors relating to WEP and GPO had been one of the leading causes of OASDI improper payments. We moved quickly to implement the SSFA on an expedited schedule, releasing 2.2 million retroactive payments totaling $15 billion by the end of April 2025. We manually processed an additional 83,000 complex cases that could not be automated. Since January 2025, we have received about 182,000 new applications from people who did not previously file for Social Security benefits because of WEP/GPO offset. Information on SSFA implementation is posted to SSA's website.

Treasury Offset Program

In March 2025, we resumed collection on delinquent debts referred to the Treasury Offset Program (TOP), which had been suspended in March 2020. TOP, operated by the Department of the Treasury's Bureau of Fiscal Service (BFS), is a fully automated, centralized offset program that intercepts Federal and State payments to collect delinquent debts owed to Federal and State agencies. Individuals who received pre-offset notifications prior to March 2020 may have their tax refunds or other Federal or State administrative payments offset to repay outstanding debts owed to SSA. We will resume mailing pre-offset notices in August 2025 to debtors who became eligible after March 2020 with referral to TOP no less than 60 days later. This initiative aims to enhance the recovery of delinquent debts and ensure compliance with Federal debt collection policies. Since the March 2025 resumption, Treasury has collected over $50 million in delinquent SSA debts.

Online Remittance Processing

Our online remittance processing gives individuals multiple options for repaying debts. In FY 2024, we processed over 469,000 remittances and collected over $94 million through our Pay.gov remittance channel, slightly more than was collected in FY 2023. In FY 2024, our Online Bill Pay option processed over 49,000 remittances—slightly more than in FY 2023—and collected over $5 million. Combined with our previously implemented Social Security Electronic Remittance System, these remittance channels now process 67 percent of our remittances—an increase of 2 percent over FY 2023.

ANTI-FRAUD INITIATIVES

National Anti-Fraud Committee

The National Anti-Fraud Committee (NAFC) provides a forum for senior leadership to collaborate and provide guidance on national and regional fraud challenges and mitigation opportunities at a strategic level. In March 2025, we updated the NAFC Charter to reflect current roles, responsibilities, objectives, and initiatives. We are convening regular meetings and the annual Anti-Fraud Summit, as mandated by the Charter. We plan to continue these efforts in FY 2026.

Enterprise Fraud Risk Management Program

Our Enterprise Fraud Risk Management Program conducts Fraud Risk Assessments (FRA) and documents Fraud Risk Profiles for our major lines of business and services, consistent with the Government Accountability Office Framework, Payment Integrity Information Act of 2019, and OMB Circular No. A-123. Since the FY 2022 introduction of the Fraud Risk Review (FRR) and the Fraud Risk Determination (FRD), we have completed 7 FRRs and 17 FRDs through FY 2024. In FY 2024, we re-assessed fraud risks in the eServices and Administrative programs. We also completed the Enumeration and Debt Management Fraud Risk Profiles. In FYs 2025 and 2026, we anticipate initiating the re-assessment of fraud risk in the Representative Payee, SSI, OASDI, and Occupational programs. We also plan to complete the re-assessment and Fraud Risk Profiles of the eServices, Administrative, Representative Payee, and Disability programs.

Our Deputy Commissioners (DCs) play a critical role in EFRM governance. The DCs review and provide concurrence at the conclusion of the FRAs, annotate risk responses, and approve final Fraud Risk Profiles to ensure that we strategically assess fraud risks and allocate resources to address the most significant risks. As an example, the agency allocated resources to implement additional control measures to combat diversion of benefit fraud schemes perpetrated online and over the telephone. In FYs 2024–2026, the DCs will strategize fraud mitigation for the agency's various programs based on the results of our risk assessments.

Enhanced Identity Proofing

To mitigate fraud from identity theft, we have been strengthening identity-proofing controls across all service channels. In April 2025, we introduced new anti-fraud capabilities for claims filed over the telephone. If irregularities are detected, the individual will be asked to complete in-person identify proofing to continue processing their claim. We also continually monitor our online services for evolving fraud threats and make appropriate adjustments to identity proofing controls as warranted.

We are currently strengthening our fraud controls. In March 2025, we began implementing the Department of the Treasury's BFS's Account Verification Service (AVS). AVS provides instant bank verification services to proactively and timely prevent fraud associated with direct deposit change requests.

Employee Training

Our employees are the first line of defense against fraud. We remain dedicated to equipping employees with the tools they need to effectively prevent, detect, deter, and mitigate fraud. We regularly supplement initial new hire training with detailed policy instructions, reminders, and instructional videos. In FY 2024, our employees participated in annual, mandatory anti-fraud training, including content on the key elements of fraud, protecting vulnerable adults from abuse and exploitation, preventing enumeration fraud, and working with the Cooperative Disability Investigations (CDI) program.

Cooperative Disability Investigations

CDI units are highly successful at detecting fraud before we make a disability decision, during appeals, and as part of continuing disability reviews. CDI units have contributed to a projected savings to taxpayers of more than $8.2 billion since their inception. During the reporting period April 1, 2024 through September 30, 2024, the work of CDI units led to 627 disability claims being denied or ceased due to participant ineligibility, $40.9 million in projected savings for SSA programs, and $9.9 million in SSA monetary accomplishments in the form of recoveries, fines, judgments, restitutions, and settlements. The CDI unit efforts also led to $54.2 million in projected savings for non-SSA programs. The CDI program links our OIG and local law enforcement with Federal and State workers who handle disability cases. We currently have 50 CDI units covering all 50 States and U.S. territories.

Fraud Prevention Units

We have Federal Prevention Units (FPU) based in New York City, Kansas City, and San Francisco, which process fraud redeterminations involving schemes to defraud the agency. Each unit is comprised of disability processing specialists, management officials, and administrative support. These units improve our capacity to provide expert analytical and programmatic support to disability fraud investigations. As new schemes emerge, policy evolves, and legal disputes arise, we continuously adapt our support so the FPUs can effectively carry out the redetermination process. FPU actions help mitigate fraud losses for the agency and our customers.

Special Assistant United States Attorneys

The Office of the General Counsel maintains a robust Criminal Fraud Program in which criminal fraud prosecutors are recruited, hired, and assigned as Special Assistant United States Attorneys (SAUSA) to 33 United States Attorney Offices around the country. These SAUSAs work with OIG and other law enforcement agencies to investigate and prosecute cases of alleged Social Security fraud and related crimes that would not otherwise be prosecuted in Federal courts. The Budget will support an expansion of SAUSAs to 50 offices by October 1, 2025, consistent with the Presidential memorandum, Preventing Illegal Aliens from Obtaining Social Security Act Benefits.

CONSULTATIVE EXAMS

In some cases, a claimant does not provide adequate evidence about their impairment(s) for the State Disability Determination Services (DDS) 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.

The DDSs are responsible for maintaining good working relationships with the medical community to recruit and sustain a sufficient pool of physicians and specialists who are qualified and willing to conduct CEs. Since the beginning of FY 2022, the DDSs have been focused on restoring the network of active CE providers, which reached an inadequate level during the COVID-19 pandemic. The recruitment efforts of the DDSs have helped maintain a net gain of over 1,500 CE providers since FY 2022. The higher number of active providers in the network allows us to schedule CEs timely for all cases that need them, which improves overall processing time for disability claims. Although CE wait times can vary for claimants, as of March 2025, the average time between schedule date and the CE appointment date was 26.4 days—an improvement of around 8 days from FY 2022.

In FY 2024, the national CE rate was 35.5 percent, unchanged from FY 2023. The national CE cost per case increased from $302.78 to $317.53, and total CE costs also increased from $355 million in FY 2023 to $379 million in FY 2024. We include these higher medical costs for CEs in our fixed cost increases. The Budget assumes these rates continue into FY 2026 by state, and the recent regional realignment will not affect the overall totals.

Table 3.3 – FY 2024 Consultative Examination Counts and Cost Data[1]

FY 2024 CEs (All Workloads)	Annual Number of Cases Completed with at Least One CE[2]	CE Rate[3]	CE Costs[4]	CE Costs per Case[5]
National Total (DDS + Federal)	1,193,703	35.5%	$379,035,537	$317.53
ALL DDS	1,193,444	35.60%	$378,936,940	$317.52
Boston Region	39,825	28.20%	$11,142,130	$279.78
CT	10,595	32.60%	$2,630,090	$248.24

[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.

FY 2024 CEs (All Workloads)	Annual Number of Cases Completed with at Least One CE[2]	CE Rate[3]	CE Costs[4]	CE Costs per Case[5]
ME	4,088	28.10%	$1,317,880	$322.38
MA	14,412	23.80%	$4,198,945	$291.35
NH	4,945	34.10%	$1,644,857	$332.63
RI	3,285	26.90%	$637,861	$194.17
VT	2,500	36.70%	$712,497	$285.00
New York Region	149,948	47.00%	$37,841,850	$252.37
NJ	30,532	36.10%	$9,123,496	$298.82
NY	107,769	49.80%	$25,240,295	$234.21
PR	11,647	63.80%	$3,478,059	$298.62
Philadelphia Region	118,330	34.30%	$37,856,857	$319.93
DE	3,121	31.90%	$1,425,462	$456.73
DC	2,889	32.40%	$1,685,409	$583.39
MD	15,715	35.40%	$8,281,565	$526.98
PA	61,699	37.50%	$16,048,848	$260.12
VA	23,298	25.70%	$6,598,525	$283.22
WV	11,608	43.40%	$3,817,048	$328.83
Atlanta Region	290,291	36.40%	$93,657,848	$322.63
AL	29,564	41.50%	$10,780,386	$364.65
FL	76,601	34.60%	$23,865,292	$311.55
GA	34,616	37.80%	$11,457,518	$330.99
KY	31,118	38.10%	$9,040,250	$290.52
MS	18,225	39.90%	$5,559,589	$305.05
NC	49,292	37.80%	$14,821,932	$300.70
SC	13,250	22.70%	$4,056,357	$306.14
TN	37,625	38.60%	$14,076,524	$374.13
Chicago Region	194,707	33.80%	$58,664,383	$301.30
IL	41,241	34.70%	$13,038,991	$316.17
IN	32,250	46.20%	$10,064,875	$312.09
MI	41,405	34.00%	$10,711,137	$258.69
MN	11,863	27.00%	$5,100,574	$429.96
OH	49,410	31.20%	$13,292,440	$269.02
WI	18,538	29.70%	$6,456,366	$348.28
Dallas Region	140,364	31.10%	$43,993,583	$313.42
AR	16,692	26.80%	$5,027,598	$301.20
LA	18,453	33.40%	$5,045,371	$273.42
NM	8,197	33.60%	$2,698,497	$329.21
OK	22,156	39.60%	$6,147,497	$277.46
TX	74,866	33.80%	$25,074,620	$334.93
Kansas City Region	50,938	34.10%	$17,899,889	$351.41
IA	9,689	27.80%	$3,212,924	$331.61
KS	9,997	40.80%	$4,721,370	$472.28
MO	26,006	35.20%	$7,757,913	$298.31

FY 2024 CEs (All Workloads)	Annual Number of Cases Completed with at Least One CE[2]	CE Rate[3]	CE Costs[4]	CE Costs per Case[5]
NE	5,246	32.50%	$2,207,682	$420.83
Denver Region	24,853	29.10%	$12,804,538	$515.21
CO	11,690	32.20%	$5,102,254	$436.46
MT	2,758	27.80%	$1,334,321	$483.80
ND	1,421	23.60%	$634,911	$446.81
SD	1,993	23.20%	$1,591,687	$798.64
UT	5,586	27.80%	$2,627,442	$470.36
WY	1,405	31.90%	$1,513,923	$1,077.53
San Francisco Region	148,385	39.90%	$48,566,771	$327.30
AZ	22,331	34.70%	$11,153,678	$499.47
CA	114,863	42.90%	$33,583,529	$292.38
HI	1,815	19.20%	$857,111	$472.24
NV	9,376	31.30%	$2,972,453	$317.03
Seattle Region	35,803	30.90%	$16,509,091	$461.11
AK	758	21.30%	$770,288	$1,016.21
ID	5,238	26.00%	$2,085,929	$398.23
OR	10,270	32.00%	$4,030,390	$392.44
WA	19,537	32.50%	$9,622,484	$492.53
Federal	259	3.90%	$98,597	$380.68

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 3.4—Appropriation History Table

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
2016	$12,513,000,000 [1]	$11,817,945,000 [2]	$11,620,945,000 [3]	**$12,161,945,000 [4]**
2017	$13,067,000,000 [5]	$11,898,945,000 [6]	$12,481,945,000 [7]	**$12,481,945,000 [8]**
2018	$12,457,000,000 [9]	$12,392,945,000 [10]	$11,992,945,000 [11]	**$12,872,945,000 [12]**
2019	$12,393,000,000 [13]	$12,557,045,000 [14]	$12,951,945,000 [15]	**$12,876,945,000 [16]**
2020	$12,773,000,000 [17]	$13,071,945,000 [18]	- - - [19]	$12,870,945,000 [20]
CARES Act [21]				$338,000,000
Final				**$13,208,945,000**
2021	$13,351,473,000 [22]	$12,970,945,000 [23]	- - - [24]	$12,930,945,000 [25]
Supplemental [26]				$38,000,000
Final				**$12,968,945,000**
2022	$14,188,896,000 [27]	$14,066,945,000 [28]	- - - [29]	**$13,341,945,000 [30]**
2023	$14,773,300,000 [31]	$14,441,945,000 [32]	- - - [33]	**$14,126,978,000 [34]**
2024	$15,489,200,000 [35]	$13,953,978,000 [36]	$14,418,978,000 [37]	**$14,226,978,000 [38]**
2025	$15,401,924,000 [39]	$13,825,776,000 [40]	$14,735,978,000 [41]	**$14,298,978,000 [42]**
2026	$14,792,978,000 [43]			

[1] 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).

[2] H.R. 3020.

[3] S.1695.

[4] 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).

[5] 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).

[6] H.R. 5926.

[7] S. 3040.

[8] 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).

[9] 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).

[10] H.R.3358.

[11] S. 1771.

[12] 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).

[13] 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).

[14] H.R. 6470.

[15] S. 3158.

[16] Department of Defense and Labor, Health and Human Services, and Education Appropriations Act, 2019 and 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).

[17] 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).

[18] H.R. 2740.

[19] 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.

[20] 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.

[21] 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.

[22] 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.

[23] H.R.7614.

[24] The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which included $12,868,945,000 for LAE.

[25] 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.

[26] 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.

[27] 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.

[28] H.R. 4502.

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

[30] 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.

[31] 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.

[32] H.R. 8295.

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

[34] Consolidated Appropriations Act, 2023 (P.L. 117-328). The total included $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 included $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 adjustment to remain available for 18 months through March 31, 2024. P.L. 117-328 provided 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 included $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.

[35] The FY 2024 Budget included $50,000,000 in no-year funding in the LAE account to modernize our benefits system. The FY 2024 Budget also included $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 was 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.

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

[37] S. 2624

[38] Further Consolidated Appropriations Act, 2024 (P.L. 118-47). The total included $1,851,000,000 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 $1,578,000,000 allocation adjustment to remain available for 18 months through March 31, 2025. P.L. 118-47 provided 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 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.

[39] The FY 2025 Budget included $50,000,000 in no-year funding in the LAE account to modernize our benefits system. The FY 2025 Budget also included $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 proposed $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 proposed 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 included 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.

[40] H.R. 9029

[41] S. 4942

[42] Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4). The total includes $1,903,000,000 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 $1,630,000,000 cap adjustment to remain available for 18 months through March 31, 2026. P.L. 119-4 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 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.

[43] The FY 2026 Budget proposes $2,397,000,000 in dedicated program integrity funding, including $273,000,000 in base program integrity funding and a $2,124,000,000 adjustment, to remain available until March 31, 2027. Dedicated program integrity funding covers the costs associated with CDRs and SSI redeterminations, anti-fraud CDI units, and SAUSAs for fraud prosecutions. The Budget proposes transferring $24,600,000 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.

GENERAL STATEMENT/BUDGETARY RESOURCES/PERFORMANCE

LIMITATION ON ADMINISTRATIVE EXPENSES OVERVIEW

The Limitation on Administrative Expenses (LAE) account funds our operating expenses to administer our three major programs—Old-Age and Survivors Insurance (OASI), Disability Insurance (DI), and Supplemental Security Income (SSI)—as well as certain health insurance and Medicare prescription drug functions and the Special Benefits for Certain World War II Veterans program. We utilize LAE funds to carry out our core mission, including processing benefit applications, conducting hearings and appeals, protecting our customers through the prevention of fraud, and completing program integrity work to strengthen our programs. With LAE account funds, we provide vital services to millions of Americans in our field offices, over the phone, and online at www.ssa.gov.

Please see the Budget Overview for more information.

SIZE AND SCOPE OF OUR PROGRAMS

Our administrative budget is driven by the programs we administer—in terms of both 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 $1.5 trillion in FY 2024; and under current law, we expect benefit payment outlays to be approximately $1.6 trillion in FY 2025 and $1.7 trillion in FY 2026. This includes the SSI State supplementary payments that we administer on behalf of some States.

Table 3.5—Benefit Outlays[1]
(Dollars in billions)

	FY 2024 Actuals	FY 2025 Estimate	FY 2026 Estimate
Old-Age and Survivors Insurance	$1,293.8	$1,404.2	$1,478.0
Disability Insurance	$153.7	$163.9	$173.6
Supplemental Security Income[2,3]	$60.7	$67.5	$70.3
Total Outlays[4]	**$1,508.2**	**$1,635.6**	**$1,721.8**

We expect the total number of beneficiaries and recipients of the three major programs we administer to increase from 74.9 million in FY 2024 to 76.6 million in FY 2025 and 78.3 million in FY 2026. We expect OASI beneficiaries to increase in FY 2025 and FY 2026, while we expect DI beneficiaries and SSI recipients to slightly decrease in FY 2025 and then increase in FY 2026.

Table 3.6—Beneficiaries[2]
(Average in payment status, in millions)

	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate
Old-Age and Survivors Insurance	59.0	60.8	62.3
Disability Insurance	8.4	8.4	8.5
Supplemental Security Income[5]	7.4	7.4	7.5
Total Beneficiaries[6]	**74.9**	**76.6**	**78.3**

[1] Totals may not add due to rounding.
[2] SSI benefit payments include State supplementary payments of around $3.1 billion in FY 2024, $3.4 billion in FY 2025, and $3.5 billion in FY 2026.
[3] There were 11 monthly benefit payments in FY 2024, and there will be 12 in both FY 2025 and FY 2026.
[4] Benefit payment totals include less than $500,000 for the Special Benefits for Certain World War II Veterans program in FYs 2024, 2025, and 2026, which is not broken out separately.
[5] SSI recipients include about 133,000 in FY 2024, 135,000 in FY 2025, and 138,000 in FY 2026 who only receive a State supplementary payment.
[6] Beneficiary totals include approximately 2.5 million concurrent recipients who receive SSI as well as OASI or DI.

FUNDING REQUEST

Our FY 2026 LAE budget request of $14.793 billion supports our ongoing commitment to improve customer service, fight fraud and waste, strengthen program integrity, and optimize our workforce. We will automate workloads, modernize information technology, and leverage artificial intelligence to increase employee productivity and improve the customer experience, which will ultimately provide better service to the American public.

Table 3.7—Budgetary Request[1]
(Dollars in millions)

	FY 2024 Enacted	FY 2025 Enacted	FY 2026 Request
Budget Authority, One-Year (Dollars in Millions)			
Limitation on Administrative Expenses (LAE)[2]	$14,227	$14,299	$14,793
(Dedicated Program Integrity, Base and Adjustment, included in LAE)[3, 4]	*($1,851)*	*($1,903)*	*($2,397)*
Research and Demonstrations[5, 6]	$91	$91	$91
Office of the Inspector General (OIG)[7, 8]	$115	$115	$115
Total, Budget Authority	**$14,433**	**$14,505**	**$15,000**
Workyears (WY)[9]			
Full-Time Equivalents	57,998	53,851	50,278
Overtime	2,154	1,668	1,700
Lump Sum Leave	153	375	284
Total SSA Workyears	**60,305**	**55,894**	**52,262**
Disability Determination Services (DDS)	13,643	13,094	13,094
Total SSA/DDS Workyears	**73,948**	**68,988**	**65,356**
OIG	512	488	476
Total SSA/DDS/OIG Workyears	**74,460**	**69,476**	**65,832**

[1] Totals may not add due to rounding.
[2] LAE funding includes $150 million in FY 2024, $170 million in FY 2025, and $170 million in FY 2026 for SSI user fees. LAE funding also includes $1 million in Social Security Protection Act (SSPA) user fees.
[3] P.L. 118-47 – The Further Consolidated Appropriations Act, 2024 includes 18-month authority to obligate PI funds through March 31, 2025. P.L 119-4 – The Full-Year Continuing Appropriations and Extensions Act, 2025 includes 18-month authority to obligate PI funds through March 31, 2026. The FY 2026 Budget assumes appropriations language for FY 2026 will provide for similar 18-month authority to obligate PI funds.
[4] P.L. 118-47 and P.L. 119-4 allows SSA to transfer $15.1 million in FY 2024 and FY 2025 from the LAE account to the OIG for the costs associated with jointly operated CDI units. The President's Budget assumes a $24.6 million transfer in 2026.
[5] These amounts include $7 million in base research funding classified as mandatory.
[6] Congress appropriated $91 million in 2-year authority in both FY 2024 and FY 2025 for research and demonstration projects. The FY 2026 President's Budget proposes $91 million in FY 2026 (available through September 30, 2028) for research and demonstration projects.
[7] OIG funds do not include transfers from the SSA LAE account, Dedicated Program Integrity, to the OIG for the costs associated with jointly operated CDI units.
[8] P.L. 118-47, The Further Consolidated Appropriations Act, 2024, and P.L. 119-4, The Full-Year Continuing Appropriations and Extension Act, 2025, OIG totals include $2,000,000, which 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. The FY 2026 Budget assumes the OIG totals include $2,000,000 for similar no-year authority to obligate funds for information technology modernization.
[9] 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. Full-time equivalents include those funded by the CDI unit PI transfer from the LAE account to the OIG.

ALL PURPOSE TABLE

Table 3.8—All Purpose Table (APT)1

(in thousands)

	FY 2024 Further Consolidated Appropriations Act [2]	FY 2025 Full-Year Continuing Appropriations and Extensions Act	FY 2026 President's Budget	FY 2026 +/- FY 2025
	P.L. 118-47	P.L. 119-4		
Payments to Social Security Trust Funds				
Pension Reform	3,000	6,000	6,000	-
Unnegotiated Checks	7,000	9,000	9,000	-
Total PTF	**$10,000**	**$15,000**	**$15,000**	**-**
Supplemental Security Income				
Federal Benefits Payment	56,328,000	62,228,000	66,762,000	4,534,000
Beneficiary Services	137,000	137,000	75,000	(62,000)
Research & Demonstration [3,4]	91,000	91,000	91,000	-
Administration [5]	4,609,042	4,609,042	4,619,966	10,924
Subtotal SSI Program Level	**61,165,042**	**67,065,042**	**71,547,966**	**4,482,924**
Advance from PY	(15,800,000)	(21,700,000)	(22,100,000)	(400,000)
Subtotal Current Year SSI	**$45,365,042**	**$45,365,042**	**$49,447,966**	**4,082,924**
New Advance SSI	**$21,700,000**	**$22,100,000**	**$23,500,000**	**$1,400,000**
Limitation on Administrative Expenses				
Regular LAE				
OASDI Trust Funds	5,828,373	5,627,076	5,548,091	(78,985)
HI/SMI Trust Funds	3,114,163	3,364,226	3,730,789	366,563
Social Security Advisory Board	2,700	2,700	-	(2,700)
SSI	3,279,742	3,230,976	2,946,098	(284,878)
Subtotal Regular LAE	**$12,224,978**	**$12,224,978**	**$12,224,978**	**-**
Program Integrity Funding				
OASDI Trust Funds	521,700	524,934	723,132	198,198
SSI	1,329,300	1,378,066	1,673,868	295,802
Subtotal Program Integrity Funding [6]	**$1,851,000**	**$1,903,000**	**$2,397,000**	**$494,000**
Base Program Integrity	*273,000*	*273,000*	*273,000*	-
Adjustment [7]	*1,578,000*	*1,630,000*	*2,124,000*	*494,000*
User Fees				
SSI User Fee	150,000	170,000	170,000	-
SSPA User Fee	1,000	1,000	1,000	-
Subtotal User Fees	**$151,000**	**$171,000**	**$171,000**	**-**
Total LAE	**$14,226,978**	**$14,298,978**	**$14,792,978**	**$494,000**
Non-PI LAE	12,375,978	12,395,978	12,395,978	-
Office of the Inspector General				
Federal Funds	32,000	32,000	32,000	-
Trust Funds	82,665	82,665	82,665	-
Total, OIG [8,9]	**$114,665**	**$114,665**	**$114,665**	**-**
Total, Social Security Administration, New BA	$76,807,643	$77,284,643	$83,250,643	$5,966,000
Federal Funds	$67,258,042	$67,683,042	$73,165,966	$5,482,924
Current Year	$45,558,042	$45,583,042	$49,665,966	$4,082,924
New Advance	$21,700,000	$22,100,000	$23,500,000	$1,400,000
Trust Funds	$9,549,601	$9,601,601	$10,084,677	$483,076

[1] Totals may not add due to rounding.

[2] The regular LAE and program integrity program splits included in this APT are different than those included in the FY 2024 Further Consolidated Appropriations Act report language due to updated estimates. The program integrity splits included in the FY 2024 Further Consolidated Appropriations Act report language are $389 million and $1.462 billion for OASDI and SSI, respectively.

[3] These amounts include $7 million in base research funding classified as mandatory.

[4] The 2024 Further Consolidated Appropriations Act includes $91 million in FY 2024 (available through September 30, 2026) for research and demonstration projects. The Full Year Continuing Appropriations Act, 2025 includes $91 million in FY 2025 (available through September 30, 2027) for research and demonstration projects. The FY 2026 President's Budget assumes $91 million in FY 2026 (available through September 30, 2028) for research and demonstration projects.

[5] Total SSI Administration reflects the sum of SSI regular LAE and SSI Program Integrity included in the LAE section.

[6] P.L. 118-47 – The Further Consolidated Appropriations Act, 2024 includes 18-month authority to obligate PI funds through March 31, 2025. P.L 119-4 – The Full-Year Continuing Appropriations and Extensions Act, 2025 includes 18-month authority to obligate PI funds through March 31, 2026. The FY 2026 Budget assumes appropriations language for FY 2026 will provide for similar 18-month authority to obligate PI funds.

[7] P.L. 118-47 and P.L. 119-4 allow SSA to transfer $15.1 million in FY 2024 and FY 2025 from the LAE account to the OIG for the costs associated with jointly operated CDI units. The President's Budget assumes a $24.6 million transfer.

[8] P.L. 118-47, The Further Consolidated Appropriations Act, 2024, and P.L. 119-4, The Full-Year Continuing Appropriations and Extension Act, 2025, OIG totals include $2,000,000, which 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. The FY 2026 Budget assumes the OIG totals include $2,000,000 for similar no-year authority to obligate funds for information technology modernization.

[9] OIG funds do not include transfers from the SSA LAE account, Dedicated Program Integrity, to the OIG for the costs associated with jointly operated CDI units.

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 3.9—State Supplement Payments
(Dollars in millions)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate
Federally Administered State Supplement Payments	$3,082	$3,410	**$3,505**
Offsetting Collections	$3,357	$3,418	**$3,516**

Participating States pay us user fees to administer their programs, based on a schedule established by the Social Security Act. The user fee was $14.78 per SSI check payment in FY 2024 and is $15.22 in FY 2025. We estimate that the user fee will increase to $15.60 per payment in FY 2026. 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 3.10—SSI User Fee Collections[1,2]
(Dollars in millions)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate	*FY 2025 to FY 2026 Change*
SSA User Fee Collections	$144	$164	**$170**	*+$6*
Treasury User Fee Collections	$74	$80	**$81**	*+$1*
Total User Fee Collections	$218	$244	**$251**	*+$7*

[1] The enacted user fee authority was up to $150,000,000 for FY 2024 and up to $170,000,000 for FY 2025. Any fees collected in excess of the appropriated amount may be used to cover a shortfall in collections for future years.
[2] FY 2024 had 11 payments. FY 2025 and FY 2026 have 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 fiscal year and possibly the 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 3.11—Estimated SSA User Fee Collections by State
(Dollars in thousands)

State	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate
Arkansas	*	*	*
California	$120,930	$137,584	$142,357
Delaware	$55	$63	$66
District of Columbia	$107	$117	$122
Georgia	*	$1	$1
Hawaii	$229	$257	$268
Iowa	$95	$98	$103
Kansas	*	*	*
Louisiana	*	*	*
Maryland	*	*	*
Michigan	$1,123	$1,293	$1,353
Mississippi	$1	$1	$1
Montana	$63	$67	$70
Nevada	$1,785	$2,085	$2,182
New Jersey	$17,737	$20,284	$21,227
Ohio	*	*	*
Pennsylvania	$386	$427	$447
Rhode Island	$37	$43	$45
South Dakota	*	*	*
Tennessee	$1	$1	$1
Vermont	$1,491	$1,679	$1,757
Total	**$144,040**	**$164,000**	**$170,000**

* Less than $500

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. 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 calculates 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 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. We received approximately $30 million ($23 million in FY 2025 and $7 million in FY 2026) in TMF to digitize forms and modernize beneficiary notifications to enhance service delivery and utilize Artificial Intelligence (AI) to support the disability claims process.

Table 3.12—Budget Authority and Outlays[1]
(Dollars in thousands)

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate
Budget Authority			
OASI and DI Trust Funds	$6,350,073[2]	$6,152,010[3]	$6,271,223[4]
HI and SMI Trust Funds	$3,114,163	$3,364,226	$3,730,789
SSA Advisory Board	$2,700	$2,700	$0
SSI Administrative Expenses	$4,609,042	$4,609,042	$4,619,966[10]
SSI State Supplement User Fees	$150,000	$170,000	$170,000
Non-Attorney Representative User Fees	$1,000	$1,000	$1,000

Limitation on Administrative Expenses

	FY 2024 Actual	FY 2025 Enacted	FY 2026 Estimate
Technology Modernization Funds (TMF)	$8,000	$23,000	$7,000
Total Budget Authority	**$14,234,978**	**$14,321,978**	**$14,799,978**
Administrative Outlays			
OASI and DI Trust Funds	$6,404,000[5]	$6,232,000[6]	$6,342,000[7]
HI and SMI Trust Funds	$3,392,000	$3,407,000	$3,773,000
SSI Administrative Expenses	$4,607,000	$4,669,000	$4,673,000
SSI State Supplement User Fees	$150,000	$170,000	$170,000
Non-Attorney Representative User Fees	$1,000	$1,000	$1,000
MIPPA – LIS	$0[8]	$0	$0
Postal Service Recovery Act (PSRA)	$3,000	$1,000	$0
Technology Modernization Fund (TMF)	$14,000	$23,000	$7,000
Total Administrative Outlays[9]	**$14,571,000**	**$14,503,000**	**$14,966,000**

[1] Totals may not add due to rounding.
[2] The total includes $3,786,270 in OASI and $2,563,803 in DI budget authority.
[3] The total includes $3,668,224 in OASI and $2,483,786 in DI budget authority.
[4] The total includes $3,386,592 in OASI and $2,884,631 in DI budget authority.
[5] The total includes $3,744,000 in OASI and $2,660,000 in DI outlays.
[6] The total includes $3,717,000 in OASI and $2,515,000 in DI outlays.
[7] The total includes $3,424,000 in OASI and $2,918,000 in DI outlays.
[8] A total of $22,000 was outlaid in MIPPA-LIS.
[9] 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.

AMOUNTS AVAILABLE FOR OBLIGATION/ANALYSIS OF CHANGES

Table 3.13—Amounts Available for Obligation[1,2,3]

(Dollars in thousands)

	FY 2024[4] Actual	FY 2025[5] Enacted	FY 2026[6] Estimate	FY 2025 to FY 2026 Change
Limitation on Administrative Expenses (LAE)				
Unobligated Balance, start-of-year[7]	$594,888	$284,926	$253,392	-$31,534
Unrealized Non-Attorney User Fees	-$863	$0	$0	$0
Unrealized SSI User Fees	$0	$0	$0	$0
LAE Appropriation	$14,226,978	$14,298,978	$14,792,978	$494,000
Subtotal LAE Resources	$14,821,003	$14,583,904	$15,046,370	$462,466
Total Obligations, LAE	**$14,503,609**	**$14,530,512**	**$14,993,393**	**$462,881**
Unobligated Balance, lapsing	-$69,209	$0	$0	$0
Unobligated Balance, end-of-year (LAE Carryover)	$248,185	$53,392	$52,977	-$415
Medicare Improvements for Patients and Providers Act (MIPPA) – Medicare Savings Plan (MSP)				
Unobligated Balances, start-of-year	**$14,903**	**$14,903**	**$14,903**	**$0**
Obligations, MIPPA – MSP	$0	$0	$0	$0
Unobligated Balances, end-of-year	**$14,903**	**$14,903**	**$14,903**	**$0**
MIPPA - Low Income Subsidy (LIS)				
Unobligated Balances, start-of-year	**$11,285**	**$11,263**	**$11,263**	**$0**
Obligations, MIPPA – LIS	$22	$0	$0	$0
Unobligated Balances, end-of-year	**$11,263**	**$11,263**	**$11,263**	**$0**
State Children's Health Insurance Program (SCHIP)				
Unobligated Balances, start-of-year	**$1,899**	**$1,899**	**$1,899**	**$0**
Obligations, MIPPA – SCHIP	$0	$0	$0	$0
Unobligated Balances, end-of-year	**$1,899**	**$1,899**	**$1,899**	**$0**

[1] Totals may not add due to rounding.
[2] Table does not include reimbursables, Technology Modernization Fund, or Vehicle Recharging Station funding.
[3] Due to variations in timing in the reporting of obligations, these obligations may not match those included in the Budget Appendix.
[4] FY 2024 unobligated balances, end-of-year, include approximately $82,000,000 of Program Integrity 18-month carry-out, and $166,000,000 carryover/transferred from prior-year accounts.
[5] FY 2025 unobligated balance, start-of-year, includes approximately $82,000,000 of Program Integrity 18-month funds and $203,000,000 transferred from prior-year accounts.
[6] FY 2026 unobligated balance, start-of-year, includes approximately $51,000,000 of Program Integrity 18-month funds and $203,000,000 transferred from prior-year accounts.
[7] Includes multi-year carryover funds and recoveries for IT Systems, hearings backlog, and dedicated Program Integrity funding.

Limitation on Administrative Expenses

	FY 2024[4] Actual	FY 2025[5] Enacted	FY 2026[6] Estimate	FY 2025 to FY 2026 Change
Medicare Access and CHIP Reauthorization Act (MACRA)				
Unobligated Balances, start-of-year	**$25,982**	**$25,982**	**$25,982**	**$0**
Obligations, MACRA	$0	$0	$0	$0
Unobligated Balances, end-of-year	**$25,982**	**$25,982**	**$25,982**	**$0**
Postal Service Reform Act of 2022 (PSRA)				
Unobligated Balances, start-of-year	**$14,891**	**$12,334**	**$11,076**	**-$1,258**
Obligations, PSRA	$2,556	$1,258	$0	-$1,258
Unobligated Balances, end-of-year	**$12,334**	**$11,076**	**$11,076**	**$0**
GRAND TOTAL, OBLIGATIONS	**$14,506,187**	**$14,531,770**	**$14,993,393**	**$461,623**

SUMMARY OF CHANGE IN ADMINISTRATIVE BUDGET AUTHORITY

Table 3.14—Summary of Change in Administrative Budget Authority from FY 2025 to FY 2026

		FY 2025	FY 2026	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.	**Payroll Expenses**	**$ 8,003,878**	**$ 7,627,378**	**$ (376,500)**
	Built-In Increase		$ 198,855	$ 198,855
	Program Increase		$ (575,355)	$ (575,355)
II.	**Non-Payroll Expenses**	**$ 2,357,000**	**$ 2,461,000**	**$ 104,000**
	Built-In Increase		$ 70,915	$ 70,915
	Program Increase		$ 33,085	$ 33,085
III.	**Disability Determination Services**	**$ 2,654,000**	**$ 2,820,000**	**$ 166,000**
	Built-In Increase		$ 105,395	$ 105,395
	Program Increase		$ 60,605	$ 60,605
IV.	**Information Technology Systems**	**$ 1,269,000**	**$ 1,860,000**	**$ 591,000**
	Built-In Increase		$ 0	$ 0
	Program Increase	$ 1,269,000	$ 1,860,000	$ 591,000
IV.	**OIG Reimbursable Transfer**	**$ 15,100**	**$ 24,600**	**$ 9,500**
Total, Budget Authority		**$ 14,298,978**	**$ 14,792,978**	**$ 494,000**

SUMMARY OF CHANGE IN ADMINISTRATIVE OBLIGATIONS FROM FY 2025 TO FY 2026

Table 3.15—Summary of Change in Administrative Obligations from FY 2025 to FY 2026

(Dollars in thousands)[1,2]

	FY 2025	FY 2026		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 of agency control, such as changes in employee health benefit premiums and the price of postage, for instance. These increases are not a result of fluctuations in overall agency resources or agency program or policy changes. Most agency operational costs are captured in this category as payroll costs. To isolate built-in increases from effects of other changes, all figures shown in this section represent the changing costs associated with maintaining prior-year workyear levels. Cost changes resulting from changes in workyear levels are captured in the Program Changes section.					
A1. **Payroll Expenses**	**$8,035,412**		**$8,234,267**		**$198,855**
Increases due to periodic step increases, health benefits, and career ladder promotions			$157,296		$157,296
Three-month effect of Federal pay increase effective January 2025 – 2.0%			$41,559		$41,559
A2. **Non-Payroll Costs** - Mandatory growth in non-payroll costs, including costs of security, guard services, postage, rent, lease renewals, etc.	**$1,506,872**		**$1,576,868**		**$69,996**
A3. **State Disability Determination Services** - Mandatory growth in state DDS costs, including pay raises and the costs of obtaining medical evidence	**$2,654,000**		**$2,759,395**		**$105,395**
A4. **Mailed Social Security Statements**	**$11,487**		**$12,406**		**$919**
Subtotal, Built-In Increases	**$12,207,771**		**$12,582,936**		**$375,165**

[1] Totals may not add due to rounding.

[2] Figures include Program Integrity

	FY 2025	FY 2026		Change	
	Obligations (thousands)	Federal WYs	Obligations (thousands)	Federal WYs	Obligations (thousands)
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. **Net Increase in Disability Determination Services** – Funds increased medical expenses for over 300,000 additional cases completed in the DDSs			**$60,605**		**$60,605**
B2. **Non-Payroll Costs** – Fully funds Payroll Information Exchange (PIE), which will generate significant program savings	**$838,641**		**$871,726**		**$33,085**
B3. **Information Technology (IT) – Base Funding** (excludes reimbursables)	**$1,269,000**		**$1,860,000**		**$591,000**
B4. **OIG Reimbursable Transfer for CDI Payroll (funded by PI adjustment)**	**$15,100**		**$24,600**		**$9,500**
Subtotal, Program Increases	**$2,122,741**		**$2,816,931**		**$694,190**
Subtotal, Gross Increases	**$14,330,512**		**$15,399,867**		**$1,069,355**
PROGRAM DECREASES					
C1. **Payroll Decreases – Net Decrease in SSA WYs**		**-3,632**	**-$606,474**	**-3,632**	**-$606,474**
C2. **Postal Service Reform Act**	**$1,258**		**$0**		**-$1,258**
Subtotal, Program Decreases	**$1,258**	**-3,632**	**-$606,474**	**-3,632**	**-$607,732**
Subtotal, Gross Decreases	**$1,258**	**-3,632**	**-$606,474**	**-3,632**	**-$607,732**
NO NET CHANGE					
D1. **IT Obligations Funded from Prior-Year Unobligated Balances**	**$200,000**		**$200,000**		**$0**
Subtotal, No Net Change	**$200,000**		**$200,000**		**$0**
Total Obligations, Net	**$14,531,770**	**-3,632**	**$14,993,393**	**-3,632**	**+ $461,623**

BUDGETARY RESOURCES BY OBJECT

Table 3.16—Budgetary Resources by Object
(Dollars in thousands)[1,2,3]

	FY 2025	FY 2026	Change
Personnel Compensation			
Permanent positions	$5,531,532	$5,203,165	($328,368)
Positions other than permanent	$82,550	$43,752	($38,799)
Other personnel compensation	$241,173	$246,487	$5,314
Special personal service payments	$2,000	$2,000	-
Subtotal, personnel compensation	**$5,857,255**	**$5,495,403**	**($361,852)**
Personnel Benefits	$2,191,515	$2,153,990	($37,525)
Benefits for former personnel	$3,000	$3,000	-
Travel and transportation of persons	$10,923	$10,894	($29)
Transportation of things	$5,914	$5,899	($15)
Rent, communications, and utilities			
Rental payments to GSA	$703,842	$726,359	$22,517
Rental payments to others	$189	$236	$47
Communications, utilities, misc.	$433,642	$478,558	$44,916
Printing and reproduction	$35,217	$35,125	($92)
Other contractual services (DDS, guards, etc.)	$4,809,882	$5,538,807	$728,925
Supplies and materials	$23,873	$23,811	($62)
Equipment	$320,746	$385,894	$65,149
Land and structures	$24,852	$24,787	($65)
Grants, subsidies, and contributions	$48,467	$48,341	($127)
Insurance claims and indemnities	$50,008	$49,877	($131)
Financial Transfers	$12,446	$12,413	($33)
Total Obligations	**$14,531,770**	**$14,993,393**	**$461,623**
Resources not being obligated in the current year (carrying over or lapsing)	$119,015	$52,977	($66,038)
Total Budgetary Resources	**$14,650,785**	**$15,046,370**	**$395,585**
Payments to State DDS (funded from other services and Communications, utilities, and misc.)	$2,654,000	$2,820,000	$166,000

[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, and the Altmeyer Renovation. Total budgetary resources in the table reflect FY 2025 and FY 2026 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 (TMF) funding.

ESTIMATED DISTRIBUTION OF AGENCY COSTS

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

In FY 2025, we realigned our workforce to increase staff in our direct-service operations, streamlined our headquarters and regional structures, and consolidated like functions across offices. With these changes, we are right-sizing essential services to our frontline workers to fulfill statutorily directed functions and complete integrity work to protect taxpayer dollars. In FY 2026, we plan to continue increasing employee productivity through more efficient business processes, automated workloads, IT improvements, and accelerated investment in artificial intelligence.

Table 3.17—FY 2024 - Estimated Distribution of Agency Costs[1]
(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Workyears	Salaries/ OT	Benefits	Other Objects	Total
Field Offices	26,839	58	863	**27,760**	$2,480,824	$968,106	$509,814	**$3,958,745**
Teleservice Centers	3,947	5	36	**3,988**	$268,830	$105,529	$21,922	**$396,281**
Regional Offices[2]	1,396	6	21	**1,423**	$180,213	$65,758	$318,602	**$564,573**
Subtotal, Regional/Field	**32,182**	**69**	**920**	**33,171**	**$2,929,867**	**$1,139,393**	**$850,338**	**$4,919,598**
Program Service Centers and Office of Central Operations	9,214	25	728	**9,967**	$819,048	$318,519	$120,348	**$1,257,914**
Subtotal, Operations	**41,396**	**94**	**1,648**	**43,138**	**$3,748,915**	**$1,457,911**	**$970,685**	**$6,177,511**
Office of Hearings Operations	7,512	22	396	**7,930**	$876,335	$340,797	$244,474	**$1,461,605**
Office of the Chief Information Officer	3,293	17	25	**3,335**	$441,016	$171,506	$48,387	**$660,908**
Office of Analytics, Review, and Oversight	1,923	6	61	**1,990**	$244,513	$95,088	$8,912	**$348,513**
Office of General Counsel	713	2	0	**715**	$109,176	$42,457	$66,134	**$217,767**
Headquarters	3,161	12	24	**3,197**	$411,160	$159,479	$939,958	**$1,510,598**
Subtotal, SSA	**57,998**	**153**	**2,154**	**60,305**	**$5,831,114**	**$2,267,239**	**$2,278,549**	**$10,376,902**
ITS							$1,482,641	**$1,482,641**
DDS	13,424	0	219	**13,643**			$2,646,622	**$2,646,622**
Total LAE	**71,422**	**153**	**2,373**	**73,948**	**$5,831,114**	**$2,267,239**	**$6,407,812**	**$14,506,165**

Limitation on Administrative Expenses

Table 3.18—FY 2025 - Estimated Distribution of Agency Costs[1,3]
(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Workyears	Salaries/ OT	Benefits	Other Objects	Total
Field Offices	25,595	150	1,224	**26,969**	$2,586,855	$1,005,814	$545,695	**$4,138,364**
Office of Telephone Service	4,046	19	50	**4,115**	$310,556	$120,749	$23,464	**$454,769**
Program Service Centers and Office of Central Operations	8,339	56	120	**8,515**	$789,885	$307,121	$128,818	**$1,225,824**
Regional Offices[2]	848	11	4	**863**	$117,377	$45,638	$341,025	**$504,040**
Office of Disability Adjudication	9,193	66	222	**9,481**	$1,143,700	$444,691	$285,345	**$1,873,736**
Subtotal, Direct Service	**48,021**	**302**	**1,620**	**49,943**	**$4,948,372**	**$1,924,014**	**$1,324,346**	**$8,196,732**
Office of the Chief Information Officer	3,032	31	29	**3,092**	$448,230	$174,279	$48,063	**$670,572**
Office of Law and Policy	959	13	0	**972**	$155,630	$60,511	$182,253	**$398,394**
Agency-Level Support Offices[4]	1,839	29	19	**1,887**	$245,341	$95,393	$802,338	**$1,143,072**
Subtotal, SSA	**53,851**	**375**	**1,668**	**55,894**	**$5,797,572**	**$2,254,198**	**$2,357,000**	**$10,408,770**
ITS				-			$1,469,000	**$1,469,000**
DDS	12,834	0	260	**13,094**			$2,654,000	**$2,654,000**
Total, LAE	**66,685**	**375**	**1,928**	**68,988**	**$5,797,572**	**$2,254,198**	**$6,480,000**	**$14,531,770**
OIG Transfer[5]				-			- $15,100	**- $15,100**
Total, LAE and OIG Transfer	**66,685**	**375**	**1,928**	**68,988**	**$5,797,572**	**$2,254,198**	**$6,464,900**	**$14,516,670**

Table 3.19—FY 2026 - Estimated Distribution of Agency Costs[1,3]
(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Work years	Salaries/ OT	Benefits	Other Objects	Total
Field Offices	24,505	132	1,220	**25,857**	$2,577,284	$1,004,834	$563,961	**$4,146,079**
Office of Telephone Service	3,789	8	50	**3,847**	$294,884	$114,656	$23,464	**$433,004**
Program Service Centers and Office of Central Operations	7,581	35	120	**7,736**	$725,712	$282,169	$128,818	**$1,136,699**
Regional Offices[2]	306	9	0	**315**	$42,553	$16,545	$346,616	**$405,714**
Office of Disability Adjudication	9,136	41	261	**9,438**	$1,146,513	$445,784	$289,787	**$1,882,084**
Subtotal, Direct Service	**45,317**	**225**	**1,651**	**47,193**	**$4,786,945**	**$1,863,989**	**$1,352,645**	**$8,003,579**
Office of the Chief Information Officer	2,671	24	30	**2,725**	$390,308	$151,758	$48,063	**$590,129**
Office of Law and Policy	732	9	0	**741**	$117,846	$45,821	$214,887	**$378,554**
Agency-Level Support Offices[4]	1,558	26	19	**1,603**	$212,934	$82,792	$845,405	**$1,141,131**
Subtotal, SSA	**50,278**	**284**	**1,700**	**52,262**	**$5,508,033**	**$2,144,360**	**$2,461,000**	**$10,113,393**
ITS				**-**			$2,060,000	**$2,060,000**
DDS	12,744	0	350	**13,094**			$2,820,000	**$2,820,000**
Total LAE	**63,022**	**284**	**2,050**	**65,356**	**$5,508,033**	**$2,144,360**	**$7,341,000**	**$14,993,393**
OIG Transfer[5]				**-**			- $24,600	**- $24,600**
Total, LAE and OIG Transfer	**63,022**	**284**	**2,050**	**65,356**	**$5,508,033**	**$2,144,360**	**$7,316,400**	**$14,968,793**

[1] Includes Reimbursable workyears (178 FTEs in FY 2024, 225 FTEs in FY 2025, and 225 FTEs in FY 2026). FY 2024 includes dedicated funding to reduce the hearings backlog, Postage Reform, and Altmeyer building renovation. FY 2025 includes dedicated funding for Postage Reform.

[2] Other Objects includes field office guard services and other centralized Operations contracts.

[3] Due to ongoing reorganization and realignment, this table reflects point-in-time operating assumptions as of 5/1/2025.

[4] Costs in this category include Office of Mission Support, Office of External Affairs, Office of Chief Actuary, and Office of Commissioner. Other Objects totals include multiple items which cover expenditures for the entire agency. Examples include Return to Work Incentives, Department of Interior Payroll IAA, GSA Delegations, Data Exchanges, Suitability and Reinvestigations, Facilities and Maintenance, and Headquarters Guard Services.

[5] P.L. 118-47 and P.L. 119-4 allow SSA to transfer $15.1 million in FY 2024 and FY 2025 from the LAE account to the OIG for the costs associated with jointly-operated CDI units. The President's Budget assumes a $24.6 million transfer.

PERFORMANCE TARGETS

The President's FY 2026 request will allow us to achieve the following key performance targets:

Table 3.20—Key Performance Targets

Workload and Outcome Measures	FY 2024 Actual	FY 2025 Enacted[1]	FY 2026 President's Budget
Retirement and Survivor Claims (includes Medicare)			
Retirement and Survivor Claims Completed (thousands)[2]	6,818	6,880	6,886
Disability Claims			
Initial Disability Claims Receipts (thousands)	2,317	2,209	2,307
Initial Disability Claims Completed (thousands)	2,229	2,349	2,322
Initial Disability Claims Pending (thousands)	1,178	1,015	1,000
Average Processing Time for Initial Disability Claims (days)	231	225	220
Disability Reconsiderations			
Disability Reconsiderations Receipts (thousands)	566	634	627
Disability Reconsiderations Completed (thousands)	514	570	649
Disability Reconsiderations Pending (thousands)	332	394	372
Average Processing Time for Disability Reconsiderations (days)	231	248	248
Hearings			
Hearings Receipts (thousands)	363	400	478
Hearings Completed (thousands)	423	390	403
Hearings Pending (thousands)	262	272	347
Annual Average Processing Time for Hearings Decisions (days)	342	280	270
National 800 Number			
National 800 Number Calls Handled (millions)[3]	32	35	35
Average Speed of Answer (ASA) (minutes)[4]	28	18	12
Agent Busy Rate (percent)	0.9%	9.0%	10.0%
Program Integrity			
Periodic Continuing Disability Reviews (CDR) Completed (thousands)	1,342	1,200	1,400
Full Medical CDRs (included above, thousands)	381	400	600
SSI Non-Medical Redeterminations Completed (thousands)	2,550	2,482	2,600
Selected Other Agency Workload Measures			
Social Security Numbers (SSN) Completed (millions)	19	18	18
Annual Earnings Items Completed (millions)	299	300	305
Social Security Statements Issued (millions)[5]	14	11	15
Selected Production Workload Measures			
Disability Determination Services Production per Workyear[6]	246	267	288
Office of Hearings Operations Production per Workyear	76	83	87

[1] FY 2025 does not incorporate pending reassignments of support staff to mission-critical jobs.

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[2] Includes Medicare.

[3] Includes calls handled by automation. In FY 2024, we handled almost 3.7 million calls by automation. For FY 2025 and FY 2026, we project about 4 million automated calls handled in each year.

[4] We are currently developing an alternative performance measure to supplement ASA.

[5] The Social Security Statements Issued measure includes paper Statements only. It does not include electronic statements issued. In FY 2024, *my* Social Security users accessed their Social Security Statements 40 million times. Consistent with FYs 2024 and 2025, in FY 2026, 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 $12 million.

[6] DDS Production Per Workyear (PPWY) includes cases completed via Federal assistance.

Our budget is fully integrated with our Annual Performance Plan (APP), 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 APP.

PROGRAM INTEGRITY

The FY 2026 President's Budget demonstrates our commitment to ensure only eligible individuals receive the benefits to which they are entitled, and to safeguard the integrity of our benefit programs.

The Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4) provided $1.903 billion in dedicated funding for program integrity (PI) activities in FY 2025, including a $1.630 billion cap adjustment. Our FY 2026 request includes $2.397 billion in dedicated funding for PI activities, including a $2.124 billion adjustment, $494 million above the FY 2025 enacted level.

We utilize dedicated PI funding to ensure responsible spending of taxpayer funds and to make certain that we are providing the correct benefit amounts only to those who qualify. The funding pays for continuing disability reviews (CDRs) and related workloads (e.g., appeals) to confirm that only qualified individuals receive disability payments. The funding also pays for non-medical redeterminations (RZs) to determine whether recipients receiving SSI continue to meet the program's income and resource limits. PI funding also supports Cooperative Disability Investigation (CDI) units, which review questionable disability claims and investigate cases of suspected disability fraud in order to stop payment before it occurs, and the prosecution of beneficiary-side program fraud and identity theft by Special Assistant United States Attorneys (SAUSAs).

From the adjustment funding, we make an annual transfer to the OIG for costs associated with jointly-operated CDI Unit costs. For FY 2025, we transferred $15.1 million to OIG, and the President's Budget would support a $24.6 million transfer in FY 2026.

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 Budget assumes 18-month availability for PI funding,, restricting funds exclusively for dedicated PI activities.

The PI funding also supports an expansion of Special Assistant United States Attorneys (SAUSA) to 50 offices, consistent with the White House memorandum, *Preventing Illegal Aliens from Obtaining Social Security Act Benefits*.

Our FY 2026 discretionary request assumes continued funding of these activities in the outyears, which would produce significant savings.

CDRs conducted in FY 2026 will yield an estimated return on investment (ROI) of about $8 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.[1] Similarly, the ROI for non-medical redeterminations conducted in FY 2026 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.

[1] As reflected in our 2024 Operating Plan, we realigned our accounting to ensure that we fund the full costs of our PI activities (including CDR appeals) with dedicated funding provided for that purpose. To this end, our estimated CDR ROI now accounts for the full CDR costs.

Completing medical CDRs timely is critical to good stewardship. The President's Budget assumes we will eliminate the CDR backlog and be current on all full medical CDR diaries in outyears and remain current throughout the Budget window.

In FY 2024, we completed 381,143 full medical CDRs and 2,550,132 RZs. We plan to complete 400,000 full medical CDRs in FY 2025 and 600,000 in FY 2026, making progress toward CDR currency. We also plan to complete 2.482 million RZs in FY 2025 and 2.6 million RZs in FY 2026.

Table 3.21—Program Integrity Workloads and Funding by Source[2]
(Dollars in millions)

	FY 2024 Actuals	**FY 2025 Estimate**	**FY 2026 Estimate**
Volumes			
Full Medical CDRs Completed	381,143	400,000	600,000
SSI Non-Medical RZs Completed	2,550,132	2,482,000	2,600,000
Funding[3,4]			
Unobligated Balance, start-of-year	$114	$82	$51
Dedicated Program Integrity Funding	$1,851	$1,903	$2,397
Subtotal PI Resources	**$1,965**	**$1,985**	**$2,448**
Less Unobligated Balance, end-of-year	-$82	-$51	-$50
Total PI Obligations[5]	**$1,883**	**$1,935**	**$2,397**
Old Age and Survivors Insurance (OASI)	$122	-	-
Disability Insurance (DI)	$274	$534	$723
Supplemental Security Income (SSI)	$1,340	$1,401	$1,674
Medicare Part A, Hospital Insurance (HI)	$60	-	-
Medicare Part B, Supplementary Medical Insurance (SMI)	$77	-	-
Medicare Part D, Drug Coverage	$10	-	-
Total PI Obligations[6]	**$1,883**	**$1,935**	**$2,397**

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

[2] Totals may not add due to rounding.
[3] Dedicated program integrity funds have 18-month availability. The Budget assumes funding to complete planned program integrity workloads in FY 2026, including through base funding and an adjustment.
[4] Includes a $15,100,000 transfer in FY 2024, a $15,100,000 transfer in FY 2025, and a $24,600,000 transfer in FY 2026 from LAE to the SSA's Inspector General (OIG) for the cost of jointly operated anti-fraud CDI units.
[5] Totals include the combined costs of CDRs (Full Medical, Work, and due process appeals), SSI RZs, CDI units, and the SAUSAs.
[6] We do not project workload costs for OASI, HI, SMI, or Medicare Part D. We report these costs with the actuals.

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 variables that add costs to the PI workloads, it can be difficult for the agency to 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 final workload processing levels in advance.

We track PI spending and analyze and review cyclical trends in PI costs throughout the fiscal year. We do not know what our final costs for these workloads are until the fiscal year closes and all charges are applied. Therefore, we make a conservative estimate of total expected costs at the end of the year to stay within the total available program integrity funding.

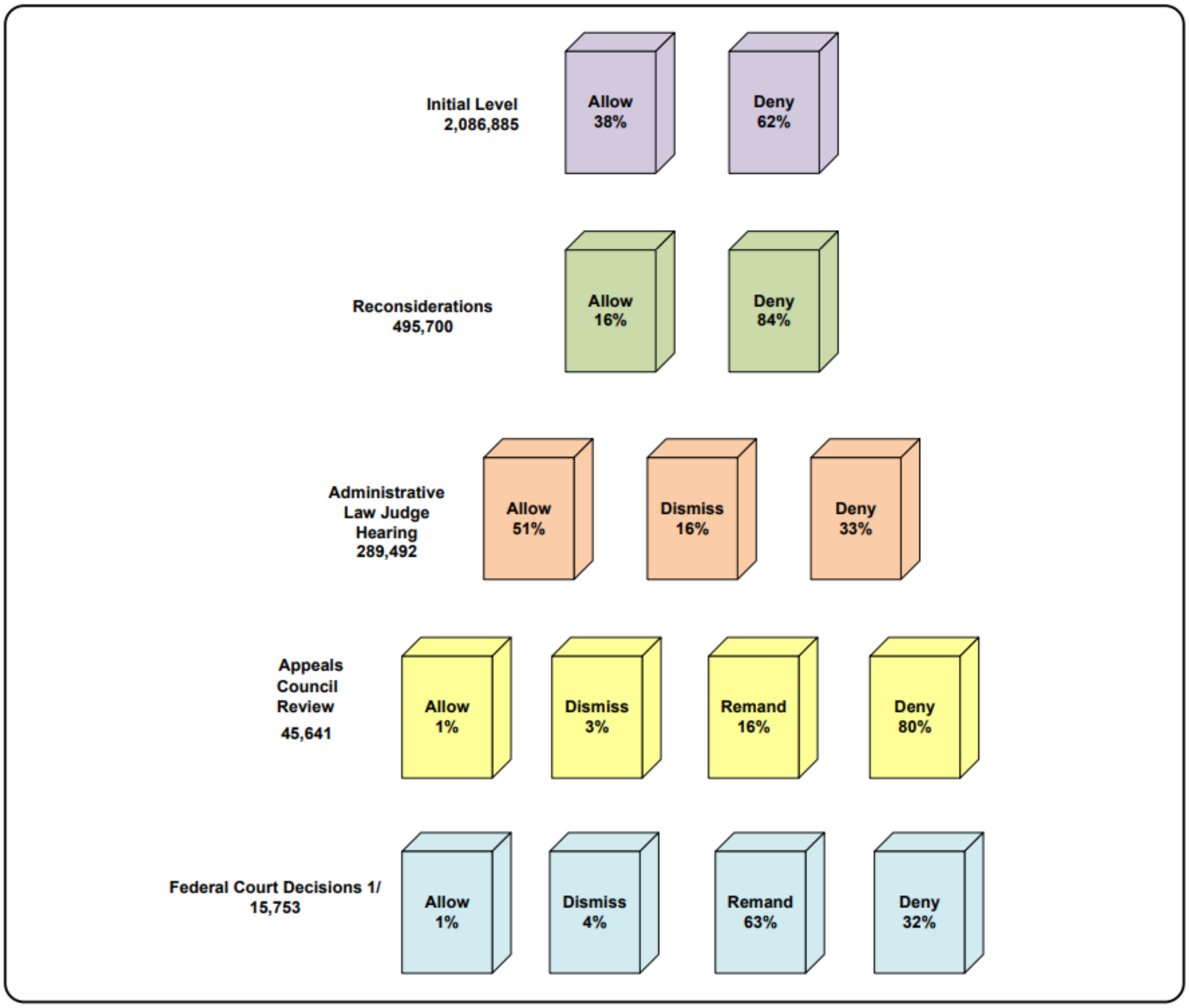
We calculate the unit costs for PI workloads using data from our Cost Analysis System. This system allocates our administrative costs to all workloads, including CDRs and RZs. Changes in other agency workloads, as well as in other large agency cost categories such as information technology (IT), can 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 include 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. ITS costs include all non-payroll costs associated with our IT investments. Direct other objects costs include non-payroll, non-ITS costs of our front-line workload processing components. Lastly, agency shared costs include all other component costs, like headquarters components as well as a portion of rent, postage, and guards.

We closely monitor and adjust our workload processing plans for PI workloads based on our real experience, while striving to hit all performance and spending targets. We also regularly monitor the effects of the cost factors described above to pace this workload throughout the fiscal year and to inform our spending decisions.

FISCAL YEAR 2024 DISABILITY DECISION DATA

Table 3.22—Fiscal Year 2024 Disability Decision Data*



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

1/ 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 data: SSA Office of Hearing Operations (OHO) and SSA Office of Appellate Operations (OAO)
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 2024, 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 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 30, 2025

INFORMATION TECHNOLOGY

Introduction

Operational Modernization

We are transforming customer service through strategic investments in modern information technology with a digital-first organization that conducts hundreds of millions of customer interactions every year. We are working toward a customer-first future where everything is available online, related services seamlessly share relevant customer data, interactions are painless, and our technology is transformed.

Modernizing our information technology (IT) is integral to our efficient operations and delivering improved services for our customers. With this mindset, we are expanding our online and mobile capabilities, developing tools for seamless online form completion, and strengthening data-sharing partnerships with healthcare providers. Our commitment to first contact resolution will result in improved phone support and field office services, including reduced wait times and enhanced service quality. We are also actively modernizing our foundational technology while responsibly decommissioning legacy systems to ensure reliability, security, and cost-effectiveness by utilizing modern information architecture, implementing artificial intelligence (AI) for task automation, and partnering with industry-leading providers to support customer-first solutions. Our efforts in 2025 and 2026 contribute to our longer-term IT modernization strategy, which is under development.

Table 3.23—Total Information Technology Systems (ITS) Budget Authority

(Dollars in Millions)[1]	TAFS Code[2]	FY 2024 Actual	FY 2025 Estimate	FY 2026 Estimate
ITS New Budget Authority	28258704	$1,116	$1,269	$1,860
Prior Year Transfer/Carryover	028X8704	$367	$200	$200
IT Reimbursables	28258704	$10	$10	$19
Subtotal ITS		**$1,492**	**$1,479**	**$2,079**
Internal Labor (Payroll)	28258704	$744	$751	$542
Total		**$2,236**	**$2,230**	**$2,621**

Modernizing IT for Mission Delivery

Our strategy for IT modernization focuses on enhanced service delivery and higher customer satisfaction levels where every interaction is meaningful, responsive, and tailored to the diverse needs of the public we serve.

[1] Totals may not add due to rounding.
[2] 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.

Our IT request aligns with and will help us achieve our **Service Delivery Strategy goals** to:

- Provide new world-class online services and mobile apps with 24 hours a day, 7 days a week (24/7) availability;
- Implement a modern, unified platform for customer communication;
- Simplify customer interactions;
- Develop technician-facing capabilities and platforms that incorporate modern technology and are integrated across service channels;
- Shift from localized workloads to portable, national workloads and evolving business processes; and
- Leverage efficient delivery models.

Below are the fiscal year (FY) 2026 projects and investments that will enable us to execute and achieve these goals:

Optimizing the Service Catalog for Online and Mobile

We recognize the public expects the same efficient and user-friendly services they experience with other businesses. To meet our customers' expectations, we are prioritizing the expansion of our online and mobile capabilities. This includes not only enhancing our existing digital products but also developing new solutions to better serve our customers.

Initiative	**Description and Outcomes**	**FY 2026 (in millions)**
National Appointment Scheduling Calendar	Streamlines and expands appointment scheduling for Social Security services by increasing the number and types of customers who can self-schedule appointments. *Outcomes: Adds new appointment types, such as post entitlement and claims. Increases the number of customers who can self-schedule appointments, resulting in fewer phone calls and shorter wait times at field offices.*	$13.0
my Social Security on Mobile	Enhances business services on *my* Social Security for deployment on a mobile platform to improve access and communication with customers. *Outcomes: Increases self-service options and digital communication methods to meet customer expectations while reducing the need for customers to make phone calls or visit a field office.*	$5.0
Claims Status Tracker	Provides detailed claim status information to claimants and representatives regarding the status of their cases online. *Outcomes: Provides online statuses, which will decrease calls and visits to field offices.*	$5.0

Notices and Customer Communications on *my* Social Security	Provides timely, clear, and accurate communications tailored to preferred delivery methods—mail, email, online, or text. *Outcomes: Provides information through channels our customers prefer and increases the likelihood that our communications reach them. Reduces manual printing by approximately 100,000 notices and saves $11 million annually in maintenance, printing materials, and postage.*	$20.0

Systems and processes to drive first contact resolution

We are working to simplify and streamline the processes for collecting essential information from our customers. This includes enabling customers to complete forms entirely online, strengthening data-sharing partnerships with healthcare providers, and ensuring that related lines of business can share information seamlessly. We are actively taking the necessary steps to make these processes better for our customers.

Initiative	**Description and Outcomes**	**FY 2026 (in millions)**
Enterprise Document Intake[3]	Allows customers to electronically upload evidence, ensuring submitted evidence and signed forms are automatically transmitted to downstream systems. *Outcomes: Reduces field office visits and simplifies downstream processing, resulting in faster and more accurate services.*	$36.0
Forms Modernization	Allows customers to fill and submit forms online. Data from forms is available for use in other steps of the benefit adjudication process. *Outcomes: Reduces adjudication time and simplifies downstream processing, resulting in faster and more accurate services.*	$10.0
Online Social Security Number (SSN)	Consolidates multiple SSN card applications and provides a digital SSN option. *Outcomes: Allows customers on-demand access to their SSN, reducing phone and field office traffic.*	$15.0
National Case Processing System (NCPS) – Scheduling	Integrates calendar availability into NCPS for all parties necessary for scheduling hearings. The public will also be able to see when representatives are available. *Outcomes: Decreases technician time by 35 minutes per case and increases the public's ability to see when representatives are available.*	$3.0
Electronic Work Continuing Disability Review (eWCDR)	Provides functionality to accept wage and employment information from payroll data providers. *Outcomes:*	$8.0

[3] Technology Modernization Funding (TMF) is outside of this budget request. TMF is not reflected in the amount listed because we separately secured that funding to support this work.

Initiative	Description and Outcomes	FY 2026 (in millions)
	Reduces manual processing of notices and forms. Reduces improper payments due to concealed earnings.	
Electronic Evidence Acquisition Product	Provides electronic exchange of Health IT information with healthcare partners to simplify medical document collection. *Outcomes: Increases number of cases using Health IT, onboards new healthcare industry partners to make it easier for customers to provide medical documentation, and allows SSA to make accurate disability determinations more quickly.*	$18.0

First Contact Resolution

While we encourage our customers to utilize our more efficient online and mobile channels, we understand that some may still prefer to conduct business over the phone, speak directly with a representative, or visit a field office for support. To accommodate these preferences, we are committed to strengthening these channels to ensure that we can address customer needs effectively on the first contact, minimizing wait times and enhancing overall service quality.

Initiative	Description and Outcomes	FY 2026 (in millions)
Enterprise Contact Center (ECC) includes 800 Number Interactive Voice Response (IVR)	Includes phone channel management and processing system IVR features to increase self-service capabilities. *Outcomes: Increases call routing to automated systems by 15 percent and integrates claim status and appointment scheduling into IVR. Allows SSA to serve more people and reduce wait times for customers who cannot use self-service.*	$15.0
Technician Experience Dashboard (TED)	Gives technicians a more holistic view of the customer to provide faster, integrated services. *Outcomes: Introduces more ways to help customers and builds in AI policy chatbot to increase speed of service to more customers.*	$32.0
Consolidated Claims Experience (CCE)	Provides a centralized hub to process benefits inquiries faster as part of larger Benefits Modernization initiative. *Outcomes: Reduces the number of systems SSA staff must use to complete tasks, increasing speed of service for customers.*	$30.0

Modernize foundational field office technologies

The transformation of our underlying technology infrastructure to optimize reliability, security, and cost effectiveness is essential for supporting the modern, customer-first solutions we will deliver. We are modernizing our information architecture, while responsibly decommissioning legacy systems, to simplify maintenance of complex systems. AI will augment and automate routine tasks to enhance and streamline technicians' review. We will outsource commodity IT functions to more efficient partners while industry-leading digital identity solutions will address fraud.

Initiative	**Description and Outcomes**	**FY 2026 (in millions)**
Modern Data Layer	Builds a layer of data products to connect the front-end applications to the back-end data stores. Data will be organized with the customer at the center of the model. *Outcomes: Organizes data and reduces deployment time to ensure new services and functionality is delivered to customers more efficiently.*	$30.0
Automated Exhibiting and Prep Work	Upgrades existing software to allow for the automation of prep work by reviewing and exhibiting evidence and eliminating duplicate information. *Outcomes: Decreases the time spent by technicians by 15 minutes per case at the reconsideration, initial, and hearing levels, allowing us to process more claims.*	$6.0
Business Resilience Automation	Allows for movement of workloads between data centers as business or environmental circumstances demand. *Outcomes: Enable 99.99% uptime to better support 24x7 system availability and align with our focus on providing online and mobile apps for customer self-service*	$110.0
Improve and Integrate Identity Assurance across channels	Expands customer identity verification and access levels, which is critical for online services. *Outcomes: Provides additional fraud prevention measures and modernizes our Federated Identity System (FIS), strengthening program integrity.*	$50.0
National Workload Management System	Creates the ability to send work to the next available technician regardless of where the case was initiated. Enables a national queue where work can be processed in a first-in, first-out manner. *Outcomes: Shares workloads more efficiently across regions and reduces wait times in busier regions.*	$8.0
Analytics and Disability Decision Support (ADDS) - IMAGEN[4]	Leverages AI and machine learning to analyze medical evidence and support disability determinations, particularly increasing disability determination services (DDS) usage and expanding functionality to hearings offices. *Outcomes: Shortens disability claims processing times, allowing us to process more disability decisions.*	$16.0

[4] TMF is not reflected in the amount listed because we separately secured that funding to support this work.

Initiative	Description and Outcomes	FY 2026 (in millions)
AI for Drafting Medical Summaries and Dispositions	Provides AI summary of medical evidence. Uses AI to read the evidence in the file and generate a summary of the facts. *Outcomes: Disability adjudicators and reviewers will save 30 minutes per case.*	$9.0
Management Information for NCPS	Enables optimization of workload allocation. *Outcomes: Decreases task time and improves processing time at the appeals level for case closure.*	$5.0
Automated Medical Acquisition and Processing	Automates medical evidence of record requests at DDS case receipt and obtains medical evidence earlier in the disability adjudication process. Leverages AI technologies to identify determination ready claims once evidence is in file. *Outcomes: Decreases processing time by 15 minutes per case at the initial level.*	$6.0
Automation for Processing Center (PC)	Automating top issues that cause fall out to PCs via real-time feedback from PC technicians. *Outcomes: Addressing root-cause of fallouts will prevent cases from going to the PCs, which will lower case volumes that are backlogged in the PCs as well as quicken claims processing for the public.*	$10.0

Investing in Customer Experience and Artificial Intelligence Solutions

We are allocating budget resources to develop innovative data products that create centralized, customer experience-oriented data solutions. These solutions will streamline the collection, access, and sharing of data across various products and services, ensuring timely and accurate information for our customers. By centralizing our data, we enhance our product delivery engine, providing consistent and reliable information that improves operational processes and ensures seamless service across different product lines. This approach also accelerates our time to market for new products, allowing us to respond quickly to customer needs and market demands. Utilizing modern technologies like microservices and application program interfaces will help us phase out outdated systems, simplify data integration, and migrate our data and applications to the cloud, ultimately leading to a better customer experience.

In parallel, we are committed to investing in innovative AI solutions to enhance processing efficiencies, improve service delivery, and bolster customer satisfaction while detecting and preventing fraud. Our initiatives include implementing customer service automation through an IVR system, deploying AI chatbots and virtual assistants for 24/7 support, and automating large-scale document and form processing. We will also develop internal AI tools to provide staff with instant access to relevant policy and process information to enhance decision-making and program integrity. Additionally, we will create AI-enabled productivity tools tailored for SSA, streamlining operations and improving service delivery.

IT Investments for Mission Support Services

We are investing in management and analysis tools to support employee productivity and accountability. Investment areas include E-Government Initiatives, Financial Systems, Human Resources (HR) Investments, and Records Management. Key initiatives include:

- **Enhance Teleservice Center Performance Monitoring:** Includes HR product functionality that allows us to better monitor and respond to staff-level teleservice center performance metrics.
- **Transition to New Time and Attendance System:** We are working with our current payroll provider, the Department of the Interior, to find an alternate time and attendance application that meets the requirements of both agencies.

IT Infrastructure, IT Security, and IT Management

We are committed to enhancing our operations by investing in IT infrastructure, cybersecurity, and IT management to help us transition to an online organization that fulfills our mission to deliver millions of customer interactions every year.

IT Infrastructure

Our infrastructure initiatives provide the foundation for building and operating our IT with best-in-class uptime and support continuity of service and systems growth. We will invest in critical refreshments that have been delayed from previous years and modernization initiatives that are foundational to building the secure, available, multi-channel services our public demands. Key infrastructure initiatives include:

- **IT Operations Management (ITOM) Improvements:** We are replacing our ITOM technologies and practices in a multi-year effort to improve how we manage our IT capabilities in a hybrid cloud ecosystem.
- **Mainframe Business Resilience:** Business resilience automation will allow us to move workloads between data centers as business or environmental circumstances demand. Our target is to enable 99.99 percent uptime to better support a 24/7 system availability to align with our focus on providing online and mobile apps for customer self-service.
- **Deferred Hardware Refresh:** Funding will support storage hardware refreshments and end user laptop refreshments deferred over several budget cycles, and enhancements for critical virtual infrastructure that hosts many public-facing services.
- **Moving to Internet Protocol Version 6 (IPv6):** We are transitioning communications to IPv6 in accordance with the Office of Management and Budget (OMB) memorandum M-21-07, *Completing the Transition to Internet Protocol Version 6,* and Executive Order 14208, *Improving the Nation's Cybersecurity*.
- **Application Development Infrastructure:** Funding will support enterprise-wide analysis, design, development, coding, testing, and release services for application development that integrates user-centered development, testing, and standards, ensuring that applications comply with Section 508 and Enterprise Architecture standards.

IT Security[5]

We are committed to maintaining the public's trust in our ability to protect sensitive data. We will do this by utilizing advanced cybersecurity controls and continuously assessing the threat landscape. Key initiatives include:

- **Expanding our Zero Trust Architecture:** While focusing on High Value Assets as described in OMB M-19-03, *Strengthening the Cybersecurity of Federal Agencies by Enhancing the High Value Asset Program,* and OMB M-22-09, *Moving the U.S. Government Toward Zero Trust Cybersecurity Principles.*
- **Improving Critical Cybersecurity Infrastructure:** As mentioned in OMB M-24-04, *Fiscal Year 2024 Guidance on Federal Information Security and Privacy Management Requirements*
- **Enhancing Enterprise Logging Capabilities:** In support of OMB M-21-31, *Improving the Federal Government's Investigative and Remediation Capabilities Related to Cybersecurity Incidents*
- **Controlled Unclassified Information (CUI) Program:** In compliance with EO 13556, *Controlled Classification Information*, employees must 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.

IT Management

The IT management investment captures all costs associated with IT management and strategic planning (including Chief Information Officer [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. Key initiatives include:

- **Advance Technology Business Management (TBM) Practices:** Build TBM practices into the agency's IT portfolio summary to meet Federal requirements.
- **Federal Information Technology Acquisition Reform Act (FITARA) Practices:** Establish and execute processes in direct support of CIO authority enhancements per FITARA, employing sound risk management processes in alignment with the agency's enterprise risk management principles, including identifying, measuring, monitoring, and controlling risks; transparent decision-making; effective communication; and prioritization of risk.

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[5] TMF supported the successful acceleration of our multifactor authentication initiatives in FY 2024 and FY 2025.

Table 3.24—FY 2026 Agency IT Portfolio Summary

	Total Cost[6]		
Costs in Millions	**2024**	**2025**	**2026**
IT Portfolio Total*	**$2,236.20**	**$2,230.00**	**$2,620.80**
Mission Delivery	**$464.40**	**$504.00**	**$799.70**
Benefits	**$82.20**	**$110.80**	**$98.00**
Benefits Modernization	$31.40	$63.50	$56.30
Rep Payee Support Systems	$1.30	$1.40	$1.40
Benefits Systems Support	$29.60	$28.20	$22.10
Benefits Systems Updates	$19.90	$17.70	$18.20
Data and Business Intelligence	**$33.20**	**$38.30**	**$52.30**
Business Intelligence - Data Analytics	$16.70	$33.40	$34.10
Data Modernization	$16.50	$4.90	$18.20
Disability, Hearings, & Appeals	**$129.00**	**$75.20**	**$124.80**
DDS Automation	$5.70	$0.90	$0.10
Disability Claim Processing Applications	$40.30	$40.30	$43.50
Disability Modernization	$83.00	$34.00	$81.20
Earnings & Enumeration	**$23.70**	**$14.30**	**$20.80**
Earnings and Enumeration Modernization	$13.60	$6.30	$16.70
Earnings Support Systems	$6.80	$4.40	$0.30
Enumerations Support Systems	$3.30	$3.60	$3.80
Program Integrity	**$61.10**	**$138.40**	**$176.20**
Anti-Fraud Product	$6.90	$28.10	$6.60
Anti-Fraud Support Systems	$9.50	$21.70	$21.60
Debt Management Product	$2.00	$0.90	$0.00
Debt Collection Modernization	$0.00	$0.00	$22.90
Digital Identity	$39.20	$73.80	$116.10
Payment Accuracy Support Systems	$3.50	$13.90	$9.00
Service Delivery	**$135.20**	**$127.00**	**$216.20**
Enterprise Contact Center	$59.80	$95.70	$111.70
Electronic Services	$6.70	$12.70	$13.10
Notice Improvements	$4.50	$4.80	$5.00
Service Delivery Modernization[7]	$64.20	$13.80	$86.40
Business Resilience Automation	**$0.00**	**$0.00**	**$111.40**
Mission Support Services	**$153.10**	**$141.40**	**$104.90**
Admin	**$30.40**	**$39.10**	**$45.40**
Financial Management Systems	$14.20	$24.60	$32.00
Human Resources Support Systems	$14.50	$12.70	$11.40

[6] Total Cost includes both ITS and internal labor expenses.
[7] The Service Delivery Modernization initiative focuses on expanding and streamlining self-service channels for our customers while also improving tools our technicians use to serve the public.

	Total Cost[6]		
Costs in Millions	**2024**	**2025**	**2026**
Office of General Counsel Product	$1.70	$1.80	$2.00
Non-OCIO FTEs	**$121.10**	**$101.60**	**$58.80**
E-Gov	**$1.60**	**$0.70**	**$0.70**
Benefits.gov	$0.20	$0.00	$0.00
Budget Formulation and Execution Line of Business (LoB)	$0.10	$0.00	$0.00
Disaster Assistance Improvement Plan	$0.10	$0.10	$0.10
E-Rulemaking	$0.10	$0.10	$0.10
Federal Audit Clearinghouse LoB	$0.00	$0.00	$0.00
Federal PKI Bridge	$0.30	$0.30	$0.20
Financial Management LoB	$0.10	$0.10	$0.10
Freedom of Information Act Portal	$0.00	$0.00	$0.10
Geospatial LoB	$0.00	$0.00	$0.00
Grants.gov	$0.00	$0.00	$0.00
Human Resources LoB	$0.10	$0.10	$0.10
Integrated Award Environment	$0.60	$0.00	$0.00
Performance Management LoB	$0.00	$0.00	$0.00
IT Infrastructure, IT Security, and IT Management	**$1,618.70**	**$1,517.50**	**$1,716.20**
Cybersecurity	**$194.40**	**$198.60**	**$237.50**
IT Security & Compliance	$194.40	$198.60	$237.50
Infrastructure	**$1,194.20**	**$1,165.40**	**$1,365.10**
Application	$120.00	$99.40	$117.00
Data Center and Cloud	$629.30	$573.50	$626.20
End User	$173.50	$184.50	$299.50
Network	$251.10	$291.70	$306.30
Output	$4.90	$5.30	$6.10
Platform	$15.40	$11.00	$10.00
IT Governance & Other Support	**$230.10**	**$153.50**	**$113.60**
Agency Communications	$6.20	$8.10	$8.40
Data Exchange Product	$0.00	$0.00	$0.00
Data Exchange Support Systems	$3.50	$5.20	$5.30
Delivery	$12.70	$16.60	$19.20
Electronic Records Management Product	$0.30	$0.40	$0.40
IT Management	$194.60	$111.30	$68.70
Reimbursable Services	$12.80	$11.90	$11.60
Optimization	**$0.00**	**$67.10**	**$0.00**

Limitation on Administrative Expenses

Table 3.25—Total Agency Cybersecurity Spend FY 2026 President's Budget
(Cost in Millions)

National Institute of Standards and Technology (NIST) Function	FY 2024	FY 2025	FY 2026
Detect	$20.2	$37.0	$36.6
Identify	$60.2	$73.8	$71.1
Protect	$166.8	$173.0	$221.1
Recover	$2.7	$2.9	$1.4
Respond	$21.2	$17.9	$26.1
Other	$2.4	$1.9	$1.7
Total	**$273.5**	**$306.5**	**$358.0**

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APPROPRIATIONS LANGUAGE

Office of the Inspector General

(Including Transfer of Funds)

For expenses necessary for the Office of Inspector General in carrying out the provisions of the Inspector General Act of 1978, $32,000,000, together with not to exceed $82,665,000, to be transferred and expended as authorized by section 201(g)(1) of the Social Security Act from the Federal Old-Age and Survivors Insurance Trust Fund and the Federal Disability Insurance Trust Fund: Provided, That $2,000,000 shall 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.

In addition, an amount not to exceed 3 percent of the total provided in this appropriation may be transferred from the "Limitation on Administrative Expenses", Social Security Administration, to be merged with this account, to be available for the time and purposes for which this account is available: Provided, That notice of such transfers shall be transmitted promptly to the Committees on Appropriations of the House of Representatives and the Senate at least 15 days in advance of any transfer.

Note: This account is operating under the Full-Year Continuing Appropriations and Extensions Act, 2025 (division A of Public Law 119–4).

GENERAL STATEMENT

OVERVIEW

The Social Security Administration (SSA) Office of the Inspector General's (OIG) strategic path, including the SSA OIG mission, vision, and strategic goals, forms the foundation for the Fiscal Year (FY) 2026 Budget. The FY 2026 Budget includes **$114.7** million for SSA OIG direct appropriations and includes **$2** million to remain available until expended for information technology (IT) modernization.

SSA OIG's mission is to serve the public through independent oversight of SSA's programs and operations. SSA OIG accomplishes this mission by conducting independent audits, evaluations, and investigations; searching for and reporting systemic weaknesses in SSA's programs and operations; and providing recommendations for program, operations, and management improvements. SSA OIG's vision is to drive meaningful change to protect taxpayer dollars. In FY 2024, SSA OIG identified $97 in returns to the government for every $1 in appropriations.[1]

The FY 2026 Budget will allow SSA OIG to perform its core mission of auditing and investigating SSA programs and operations more efficiently and effectively. In particular, SSA OIG's oversight responsibilities will increasingly rely upon building its data analytics capacity; investing in information technology modernization and automation tools; devoting resources to better understand the significance that artificial intelligence (AI) will play in SSA's program and operations and the oversight needed by SSA OIG to help identify and minimize vulnerabilities in agency systems and programs; and monitoring the agency's focus on its human capital needs to keep up with technological advances and other evolving and emerging areas. These improvements will lead to a more innovative, nimble, and responsive organization.

Cooperative Disability Investigations (CDI) Program

In addition to the request for $114.7 million for direct base appropriations, the FY 2026 Budget requests SSA transfer **$24.6** million from SSA's Limitation on Administrative Expenses (LAE) program integrity adjustment to the SSA OIG for the SSA OIG's direct costs of leading the jointly operated anti-fraud CDI Program. This funding level represents an increase of $9.5 million over the FY 2025 enacted level of $15.1 million to fund additional investigative staff for our CDI units, helping us close more cases and increase our monetary accomplishments.

[1] FY 2024 was unique due to three audits issued by SSA OIG that discovered over $9 billion in funds that SSA could use more efficiently if action was taken to implement SSA OIG's recommendations. Excluding these audits, SSA OIG's return-on-investment (ROI) would be 23-to-1.

Council of the Inspectors General on Integrity and Efficiency

In FY 2026, SSA OIG will contribute an estimated $450,700[2]to the Council of the Inspectors General on Integrity and Efficiency (CIGIE), an annual amount determined by CIGIE. CIGIE is an independent entity established within the Executive Branch to address integrity, economy, and effectiveness issues that transcend individual Government agencies and aid in the establishment of a professional, well-trained, and highly skilled workforce in the Offices of Inspectors General.

*Based on an average from the last three fiscal years, each additional investigative full-time equivalent (FTE) could potentially result in an estimated **35** additional cases closed and almost **$1** million in additional monetary accomplishments. For every additional audit FTE, SSA OIG could produce an additional audit report. Over the past three years, an SSA OIG audit, on average, has identified about **$33** million in questioned costs and about **$29** million in funds put to better use.*

STRATEGIC GOALS

SSA OIG consistently delivers valuable oversight information to SSA, the U.S. Congress, other stakeholders, and the American public. SSA OIG is committed to providing oversight and detecting fraud, waste, and abuse within SSA's programs and operations while remaining steadfast in our mission to ensure accountability and integrity in accordance with our statutory obligations and Administration's priorities.

SSA OIG will continue to prioritize our work to focus on those areas in SSA programs and operations that are most vulnerable to fraud, waste, abuse, and mismanagement. The U.S. Congress and the American people can expect us to continue our statutory work to promote the economy, efficiency, and effectiveness of SSA's programs and operations. As workloads increase and evolve, SSA OIG will continue to provide products that drive meaningful change.

SSA OIG's strategic path lays the foundation for the FY 2026 Budget. SSA OIG's strategic goals, nested within the strategic path, are:

Strategic Goal 1: Deliver solutions to promote positive change
Strategic Goal 2: Prevent and detect fraud, waste, and abuse in SSA programs and operations
Strategic Goal 3: Optimize operations
Strategic Goal 4: Strengthen our workforce

Table 4.1—OIG Performance Measures

Performance Measure	FY 2024 Target	FY 2024 Actual	FY 2025 Targets
Review and take action on 90% of hotline allegations within 5 days of receipt	90%	99.99%	90%
Substantially complete investigative fieldwork on 75% of Social Security program fraud investigations within 180 days	75%	73%	75%
Exceed the 3-year trailing average return-on-investment as reported by the Council of the Inspectors General on Integrity and Efficiency	26-to-1	97-to-1[1]	21-to-1[2]
Work with SSA to ensure 80% of the recommendations we made within the last 4 fiscal years, which SSA agreed to implement, have been resolved	80%	79%	80%
Ensure that 75% of audits are issued within one year from the entrance conference	75%	60%	75%

[1] FY 2024 was unique due to three audits issued by SSA OIG that discovered over $9 billion in funds that SSA could use more efficiently if action was taken to implement SSA OIG's recommendations. Excluding these audits, SSA OIG's return-on-investment (ROI) would be 23-to-1.
[2] FY 2025 target reflects the 3-year trailing average return on investment reported by CIGIE.

Strategic Goal 1: Deliver Solutions to Promote Positive Change

This goal aligns with SSA OIG's vision to drive meaningful change to protect American taxpayer dollars. To meet this goal, SSA OIG will prioritize initiatives in three key areas: expanded oversight responsibilities, impactful audits, and education and outreach.

Expanded Oversight Responsibilities

SSA OIG continues to devote significant resources to expanded oversight responsibilities that include areas related to artificial intelligence (AI), Social Security-related imposter scams, executive mandates, such as the April 15, 2025 Presidential Memorandum, *Preventing Illegal Aliens from Obtaining Social Security Act Benefits*, and emerging fraud schemes, such as Social Security's online services fraud and fraudulent direct deposit diversions.

Examining AI and Fighting AI-Related Fraud

Public and private sector entities continue to explore using advances in AI technology. In accordance with the Administration's directive to focus on utilizing AI to modernize the Federal government, *see* Fact Sheet: Eliminating Barriers for Federal Artificial Intelligence Use and Procurement, SSA is leveraging this emerging technology to improve operations. While AI will improve customer service and create efficiencies, AI can be exploited to commit various forms of fraud, such as using AI-powered chatbots to divert direct deposits to fake accounts, using AI-generated email imposter scams, using AI tools to generate fraudulent identification documents enabling identify theft and impersonation schemes, using AI to create an audio deep-fake or a deep-fake video, and using AI to create synthetic identities, which can be used to fraudulently claim benefits or direct funds away from SSA beneficiaries and recipients, resulting in significant financial losses. In FY 2023, SSA OIG established an internal AI Task Force comprised of investigators, auditors, IT specialists, and attorneys to confront these issues.

Beginning in 2024, SSA's AI Core Team and SSA OIG's AI Task Force began regular meetings on AI as a result of a mutually agreed upon action item stemming from SSA's National Anti-Fraud Committee Summit. To better position the organization to respond to potential threats created by AI, several members of the AI Task Force completed advanced training on the topic.

In FY 2026, SSA OIG's oversight responsibilities will increase significantly in this area to identify and minimize vulnerabilities in agency systems, security, and programs and make recommendations to SSA's AI efforts as appropriate. To prepare for this challenge, significant investments are required in hardware, software, and training to ensure SSA OIG personnel possess the appropriate tradecraft to investigate AI-enabled criminal activity. The goal is to protect vulnerable Americans and provide Federal and State prosecutors with the forensic data required to successfully prosecute fraud against SSA. In recent years, SSA OIG identified best practices and lessons learned from analytical and investigative work performed combatting pandemic and imposter-related fraud. These best practices and lessons learned are the foundation for developing additional tools and investigative techniques to confront these new AI challenges. We have also started to collaborate with other federal agencies in an effort to expedite our response to potential AI-related fraud efforts and in sharing the best AI tools available to combat fraud generally. Investigative support, analytical resources, and technological capabilities are pivotal to deterring and dismantling emerging organized fraud schemes using AI technology to exploit SSA programs and operations.

Executive Orders and Presidential Memorandums

The Office of Investigations (OI) has remained nimble with the ability to prioritize Executive Orders and Presidential directives. Recently, Presidential Memorandum, *Preventing Illegal Aliens from Obtaining Social Security Act Benefits*, included several directives that will impact and enhance existing and future investigative work conducted by OI. Generally, the memorandum requires the Commissioner of SSA, in consultation with the Secretary of Homeland Security, to take measures that ensure ineligible aliens are not receiving funds from Social Security Act programs. This included the expansion of SSA's Special Assistant United States Attorneys (SAUSA) program to 50 offices.

In addition to our core investigative mission, in January 2025, OI pivoted and engaged with our law enforcement partners on the following initiatives that align with the priorities of the Administration:

- The Removable Alien Project – which looks to identify individuals who are receiving benefits from SSA and were ordered deported but remained in the country.

- Unaccompanied Alien Children – which looks to locate unaccounted for minors who remain in the country and their whereabouts are known – and may result in human trafficking or Rep Payee misuse investigations.

- Travel & Residency Enforcement Coop – which looks to identify Supplemental Security Income (SSI) recipients that conceal foreign travel and residency.

These initiatives involve analysis of large data sets to identify investigative leads. As these leads come to fruition, additional OI personnel will be needed to conduct investigations on individuals defrauding SSA programs and support the workload stream for the newly assigned SAUSAs and subsequent criminal prosecutions.

SSA OIG has the delegated authority to verify the use of a Social Security Number (SSN) when we receive an official request from a law enforcement entity. In the last several months, OI has received a significant increase in requests to verify SSNs. Since late January, OI has received more than double the requests to verify SSNs compared to all of fiscal year 2024. To address the additional workloads, OI realigned and trained staff to perform analytical work that support these efforts.

For example:

SSA OIG has become more agile and responsive to threats, primarily from highly organized transnational criminal organizations seeking to exploit both the SSA and their most vulnerable beneficiaries for financial gain. These investigations required the adoption of techniques and tools to manage our cases, gather information from various sources, triage and examine digital evidence, and store and analyze large datasets. Our software and hardware must comply with *EO 14141 – Strengthening and Promoting Innovation in the Nation's Cybersecurity* which requires Federal agencies to implement advanced security measures to significantly reduce the risk of successful cyberattacks on the government's digital infrastructure.

The SSA OIG is undertaking a critical shift in its digital forensics operations by transitioning from the legacy National Forensic Information Network (NFIN) to standalone forensic workstations. This change is driven by growing cybersecurity concerns, operational inefficiencies, and the increasing demands of modern forensic workflows. The current NFIN platform, while once effective, now presents heightened security vulnerabilities and suffers from significant performance limitations due to its dependence on aging centralized infrastructure and inconsistent network connectivity.

The new forensic workstations provide a decentralized, high-performance solution that enhances data security, processing speed, and examiner autonomy. Each unit is purpose-built for forensic analysis, featuring cutting-edge hardware configurations-including multi-core AMD processors, enterprise-grade storage arrays in RAID configurations, and built-in write-blockers to ensure rapid and secure evidence acquisition and analysis. Isolating each workstation from a shared network reduces exposure to outside threats and aligns with the zero-trust architecture principles mandated by *EO 14141 – Strengthening and Promoting Innovation in the Nation's Cybersecurity*.

This modernization approach significantly improves system resiliency and investigative effectiveness. It reduces examiner downtime, removes latency barriers associated with remote server access, and enables a more agile forensic response in the field and at headquarters. Additionally, it lowers long-term costs by minimizing IT maintenance burdens and reducing reliance on centralized server support, while still providing scalable and consistent forensic capabilities across the agency.

This transition positions SSA OIG at the forefront of forensic and cybersecurity innovation within the Federal space. By replacing outdated infrastructure with state-of-the-art forensic platforms, SSA OIG is reinforcing its mission to protect the integrity of SSA programs and ensuring continued compliance with Federal cybersecurity mandates.

Investigating SSA's Online Services Fraud / Direct Deposit Diversions

SSA OIG during FY 2026 and beyond will focus on Online Services fraud through targeted investigations and program oversight. SSA offers a suite of public-facing applications through which the public interacts with SSA. *See* [*Online Services | SSA*]. Through these applications, users can apply for benefits, retrieve status updates on pending applications, project retirement calculations, and even order replacement Social Security Number cards. During the COVID-19 pandemic, SSA closed its field offices to the public, resulting in a dramatic increase in the utilization of these online services. As the use of online services increased, so did the opportunity for fraudsters to manipulate SSA's online platforms. In one such example, fraudsters used stolen personally identifiable information (PII), much of which is obtained from data breaches and trafficked by transnational criminal organizations using the dark web, to file fraudulent online applications or redirect benefit payments to alternate bank accounts.

Since the start of FY 2021, SSA OIG has received more than 240,000 online services-related allegations, including fraud schemes that misuse or are facilitated by SSA's online platforms, such as *my* Social Security. In FY 2026, SSA OIG aspires to fully deploy advanced data analytics and generative AI tools to expeditiously identify and flag clusters of the most egregious cases of potential fraud for immediate investigation. As E-Service fraud continues to evolve, SSA OIG will require both analytical and investigative resources to provide oversight that is pivotal to protecting the public through FY 2026 and beyond.

Investigating Social Security-Related Government Imposter Scams

In FY 2024, SSA OIG received close to 89,000 allegations involving imposter scams. While this number has decreased from previous years, it still represents a persistent problem that threatens the integrity of SSA programs and operations.

In one case example, the SSA OIG and law enforcement partners conducted a money laundering investigation over the past five years into a group of Government imposter scammers operating in the Mid- and Southwest United States. The scammers ran a telemarketing scheme originating from call centers in India, where victims were coerced into thinking they were under investigation by fake Federal Bureau of Investigations (FBI), Drug Enforcement Administration, and SSA agents. Victims were instructed to send funds to clear their names, with methods including purchasing gift cards and sending cash via FedEx. The scheme involved "runners" in the United States collecting the funds and disposing of them as instructed. The investigation led to the identification and prosecution of over a dozen members of the criminal enterprise, resulting in substantial jail terms and restitution. The operation was responsible for over $13 million in losses to hundreds of victims.

In another case example, the SSA OIG investigative team in conjunction with the FBI, obtained seven guilty pleas in a government imposter scam case involving transnational money laundering. The first defendant was sentenced to 51 months and ordered to pay $600k in restitution. Four defendants are awaiting sentencing and two are scheduled for trial in June 2025. The scammers used robocalls originating in India to impersonate SSA officials to get victims to liquidate their savings. The victim funds were laundered throughout the U.S. and to

Central and South America. In addition, the team's efforts have assisted multiple separate investigations by the FBI, Homeland Security Investigations, and Treasury Inspector General for Tax Administration involving transnational money laundering and a target of the HSI investigation will plead guilty due to this cooperation. The investigative team continues to work with other Federal agencies, including the Secret Service, to share intelligence, generate leads, and prosecute targets across the United States. The investigative team seized over $1.4 million in victim funds from various shell companies and defendant bank accounts.

SSA OIG will continue to investigate these types of scams and leverage data analytics, partnerships with the private sector, regulatory agencies and our law enforcement partners, as well as other technology enhancements to identify scam trends, promote public awareness, and prosecute scammers. In FY 2026, SSA OIG will continue to commit staff to analyze imposter scam allegations, develop investigative leads, and deploy effective investigative strategies to combat fraud schemes.

The FY 2026 Budget will allow SSA OIG to better anticipate, recognize, and efficiently mitigate new and emerging fraud schemes, including those related to pandemic relief and government imposter scams.

Impactful Audits

SSA OIG's core audit oversight efforts revolve around SSA's most significant management challenges. SSA OIG annually identifies these challenges based on congressional mandates, audits, and investigative work.

During FY 2024 and the first half of FY 2025, SSA OIG completed audits that promoted positive change in SSA policies and procedures, such as Challenges in Recovering Supplemental Security Income Overpayments, which included nine recommendations to improve SSA's use of policies and available tools to prevent, detect, and recover SSI overpayments. Similarly, Rejection of State Death Reports reviewed the appropriateness of rejected State death reports and the impact rejections had on SSA program and administrative costs, and included three recommendations to improve the accuracy of death information in SSA's Numident and payment records. SSA OIG also promotes positive change by conducting audits that identify underpayments to beneficiaries caused by insufficient policies and controls, such SSA's application of Disability Waiting Period Exclusions.

During FY 2024 and the first half of FY 2025, SSA OIG issued 60 audits and identified almost $2 billion in questioned costs and over $10.7 billion in funds that could have been put to better use. Largely contributing to the questioned costs totals were the following audit reports:

- Supplemental Security Income Recipients who Under-report Financial Account Balances;
- Rejection of State Death Reports; and
- Impact of Undetected Marriages on Social Security Administration Payments.

In Supplemental Security Income Recipients who Under-report Financial Account Balances, SSA OIG determined SSA's SSI financial account validation process for applicants and recipients who alleged having less than $400 in financial accounts did not always lead to accurate SSI determinations resulting in projected improper payments of almost $718 million.

Year after year, one consistently reported challenge by SSA is focused on improving the prevention, detection, and recovery of improper payments. SSA OIG continues working on impactful audits that will promote cost savings and positive change in SSA policies and procedures. As of April 30, 2025, SSA OIG had 23 audits in process related to improving the prevention, detection, and recovery of improper payments.

A list of all SSA OIG ongoing audit work is available at our website.

Audits Reviewing Customer Service at SSA

SSA OIG continues to focus on customer service issues at SSA to promote positive change, which is addressed in the following reports from FY 2024.

Customer Wait Times in the Social Security Administration's Field Offices and Card Centers (May 2024): We observed customer wait times in select SSA field offices and Social Security Card Centers and determined the (1) factors that may affect customer wait times and (2) steps SSA took to reduce wait times.

Findings:

- For the 76 field offices and card centers visited, the average wait time for customers before check-in ranged from 5 to 12 minutes. Once checked in, customers waited an average of 32 to 45 minutes to receive services.
- We noted five factors that may affect customer wait times: number of customers; the check-in process; staffing; appointments; and the availability of telephone and online services.
- SSA has not developed processes to measure the effectiveness of reducing customer wait times in its offices.
- SSA did not set goals specific to wait times for customers in the office or the time customers must wait for scheduled appointments.

Recommendations:

- Develop and/or enhance systems to capture data that measure the effectiveness of initiatives to reduce customer wait times.
- Develop goals specific to wait times for customers in the office and time customers wait for scheduled appointments.

Follow-up: The Social Security Administration's Implementation of Mail Procedures (January 2024): We determined whether SSA's offices were complying with the requirements established in the agency's Mail Handling Business Process Document (BPD).

Findings:

- Most offices were meeting the requirements of 6 of the 10 BPD key issues.
- Some offices did not always meet the metrics for four key issues: the undeliverable returned mail, remittances and returned unendorsed Treasury checks, mail triaging and timeliness, and scanning mail.
- The agency needs to continue monitoring and adapting its oversight of the mail to ensure it meets the needs of the public.

Recommendations:

- Evaluate and adjust, where appropriate, the timeliness metrics for mail handling to correspond with, and support, the current mail workload.
- Evaluate and adjust, where appropriate, the monitoring process for mail handling to better identify non-compliant offices that require remediation.
- Take action, as needed, for offices we identified as non-compliant with the BPD requirements.

SSA OIG has also completed audits identifying underpayments, potential underpayments, or untimely payments of funds due or benefits to child beneficiaries, widows, SSI recipients, surviving spouses, and beneficiaries whose medical condition was not expected to improve. For example, in August 2024, SSA OIG completed an audit estimating that initial disability applications that qualify as priority cases, such as Quick Disability Determination, Compassionate Allowance, Terminal Illness, Military Casualty/Wounded Warrior, Homeless, and Presumptive Disability/Blindness, among others, for over 40,000 claimants were delayed.

SSA OIG has work in progress to determine if SSA paid OASDI beneficiaries' benefits it withheld pending the selection of representative payees. SSA OIG is also working on audits to determine whether SSA accurately denied Old-Age, Survivors, and Disability Insurance (OASDI) benefits to children for reasons unrelated to disability and paid retroactive payments to child beneficiaries receiving OASDI benefits when they were due.

SSA OIG plans to soon initiate a review to determine whether Administrative Law Judges (ALJ) appropriately dismissed claimants' requests for hearings. In 2011, SSA conducted a quality review of dismissal orders issued by ALJs in FY 2010. In 2010, ALJs issued 737,616 hearings dispositions, of which 97,574 were dismissals (13 percent). SSA found that, of the ALJ dismissals they reviewed, approximately 29,272 (30 percent) had errors. In FY 2023, ALJs issued 377,685 hearings dispositions, of which 89,640 (24 percent) were dismissals. During the FY, the average processing time for a hearing was 450 days. If ALJs inappropriately dismiss claimants' requests for hearings, the claimants must file new appeals or new claims, further delaying the benefits to which some are entitled.

In September 2024, we looked at SSA's compliance with the Strengthening Protections for Social Security Beneficiaries Act of 2018 and its policies and procedures related to representative payee reviews and educational visits. We also completed audits to identify 1) discrepancies in SSA's Electronic Representative Payee System (eRPS), 2) representative payees who were not properly established in eRPS, and 3) disabled beneficiaries receiving direct payments who previously had representative payees managing their payments.

Additionally, SSA OIG is reviewing customer service areas such as identifying SSI recipients who may also be eligible for Old-Age, Survivors, and Disability Insurance (OASDI) benefits and SSA's oversight of field office workloads. These reports are expected to be issued during FY 2025.

Audits Concerning IT Security at SSA

SSA OIG continues to be concerned as Federal information systems—and the information they hold—are increasingly becoming targets of cyber-attacks. SSA must implement a strong information security program to detect and prevent intrusions. Prior SSA OIG audit[1] and investigative work has revealed serious concerns with the security of SSA's information systems. SSA OIG performs a vital role in ensuring the agency's IT investments are economically prudent and inform the agency, the United States Congress, and the American public.

To ensure SSA OIG is positioned to provide timely, effective oversight of SSA's information security efforts in an ever-changing environment, staff need the necessary knowledge and skills. SSA OIG hired additional IT audit staff to backfill for separated IT auditors and plans to invest in ongoing training on evolving technology, new vulnerabilities, and emerging threats. During FY 2023, SSA OIG worked with contractors to assess the effectiveness of SSA's information security policies, procedures, and practices on a representative subset of the agency's information systems.[2] This is required by Federal Information Security Modernization Act of 2014 (FISMA) oversight and allows SSA OIG to perform audits that address imminent cybersecurity threats to SSA. SSA OIG continued to use contractor support to supplement IT audit resources during FY 2024 to complete important audits timely to meet agency needs. These audits resulted in 14 recommendations for the security of Business Services Online and 8 recommendations related to legacy systems modernization and movement to cloud services. Ongoing audits will make recommendations in other priority areas including protections against

[1] See the following reports: Audit Summary - The Social Security Administration's Information Security Program and Practices for Fiscal Year 2024; Summary of the Audit of the Social Security Administration's Information Security Program and Practices for Fiscal Year 2023; Security of the Social Security Administration's Disability Case Processing System; The Social Security Administration's Implementation of iPaySSA; The Social Security Administration's Controls Over Malware Introduced by Email Phishing; The Social Security Administration's Controls Over Malicious Software and Data Exfiltration; and Security of the Social Security Administration's Cloud Environment.

[2] See the following summaries of contractor reports: Security of the Web Identification, Authentication, and Access Control Systems; and Security of the Earnings Record Maintenance System - Cloud.

personally identifiable information losses, firewall administration, and SSA's information security program and practices for FY 2025.

Education and Outreach

SSA OIG remains proactive through its education and outreach efforts which include areas related to disrupting social security-related imposter scams, whistleblower rights and protections, collaboration with SSA, and promoting the SSA-OIG mission.

Disrupting Social Security-Related Government Imposter Scams

The Federal Trade Commission (FTC) reported that, in 2024, consumers lost $12.5 billion to scams, including government imposter scams. SSA remains the top Federal agency used in schemes by criminals to defraud Americans out of their hard-earned money. As scams continue to rise, our coordinated scam outreach and education efforts are more important than ever to protect consumers and empower them to "slam the scam."

Throughout the year, SSA OIG collaborates with all levels of government, leverages anti-fraud interests of private companies, and engages with special interest groups who focus on combatting fraud. SSA OIG regularly engages with the news media to broaden consumer education efforts, including through television and podcast interviews, radio engagement, social media content, and print media. We continue to amplify anti-fraud messages by fostering strategic relationships and identifying new alliances. SSA OIG, in collaboration with SSA, manages ssa.gov/scam, providing current anti-scam content and resources.

SSA OIG educates the public about the tactics scammers use and encourages the public not to engage with scammers annually through National Slam the Scam Day. The U.S. Senate, in support of our efforts to protect consumers from scams, passed a resolution by Unanimous Consent designating March 6, 2025, as National Slam the Scam Day. On March 12, 2025, U.S. Senate Special Committee on Aging Chairman Rick Scott (R-FL) held a hearing where witnesses testified about the impacts of senior loneliness, including an increased vulnerability to scams. The sixth annual National Slam the Scam Day garnered a social media audience of 25.5 million across X (Twitter), Facebook, and Instagram; a television and radio audience of almost 1 million, and a print and online audience of potentially 282 million.

Further, in collaboration with SSA, SSA OIG provides stakeholders and State Disability Determination Services (DDS) with training programs, presentations, and outreach materials to help employees better identify potentially fraudulent claims activity and scams. SSA OIG, in collaboration with SSA, plans to lead and expand upon Slam the Scam Day activities and efforts in FY 2026.

Section 1140 Education Outreach

Section 1140 of the *Social Security Act* is a consumer protection law that prohibits misleading consumers by giving a false impression of association with, or authorization or endorsement by, the Social Security Administration through any type of communication. In FY 2026, SSA OIG will continue to perform Section 1140 outreach and education across industries and local communities by:

- Providing presentations and mailers to the telecommunications industry;
- Providing public libraries with targeted print materials and trainings;
- Educating law firms and disability representatives on how to avoid potential Section 1140 violations; and
- Engaging with Internet Service Providers who host IP addresses associated with malicious traffic.

Engaging with SSA and External Stakeholders

SSA OIG proactively engages with the U.S. Congress and keeps them informed of SSA OIG's audits, criminal investigations, resulting prosecutions, civil enforcement, public outreach, and education. SSA OIG provides the Semiannual Report, Quarterly Scam Reports, bi-monthly news spotlights, and weekly news clips to the U.S. Congress. Further, SSA OIG participates in oversight hearings, briefs Congressional Staff, responds to inquiries from Members of Congress and Congressional Committees, and answers constituent inquiries. SSA OIG ensures the U.S. Congress is aware of pressing issues and addresses questions involving fraud, waste, and abuse at SSA.

SSA OIG also engages with the U.S. Attorney's Office to issue press releases through the U.S. Department of Justice (DOJ). This demonstrates SSA OIG's commitment to investigating Social Security fraud, thereby deterring potential fraudsters and criminals.

SSA OIG leadership continues to collaborate with SSA leadership through the National Anti-Fraud Committee (NAFC). The NAFC is a partnership between SSA and SSA OIG that supports strategies for combatting fraud, waste, and abuse in SSA programs and operations. The NAFC meets quarterly to share information and create concrete steps for addressing SSA fraud. OMB has heralded the NAFC as a model for agency/OIG partnership consistent with OMB Memo M-22-04.

Strategic Goal 2: Prevent and Detect Fraud, Waste, and Abuse in SSA Programs and Operations

SSA OIG's second strategic goal is to prevent and detect fraud, waste, and abuse in SSA programs and operations. SSA OIG is responsible for protecting the integrity and efficiency of SSA's administration of approximately $1.6 trillion in benefit payments annually to more than 70 million people.

During FY 2024 and the first half of FY 2025, SSA OIG issued 60 audit reports with recommendations to improve SSA's programs and operations. During that same time, investigations conducted by SSA OIG resulted in 833 criminal convictions and contributed to over $322 million in monetary accomplishments, which includes court-ordered restitution, recoveries, settlements, judgments, fines, civil and administrative actions, and estimated savings resulting from investigations.

Ensuring Stewardship of SSA Programs

Completing audits that ensure the accuracy of benefit payments

In its FY 2024 Agency Financial Report, SSA estimated it made approximately $4.1 billion in OASDI improper payments and $6.5 billion in SSI improper payments in FY 2022. Of those, $3.3 billion were OASDI overpayments and $5.6 billion in SSI overpayments; $800 million in OASDI underpayments and $900 million in SSI underpayments.

The FY 2026 Budget will allow SSA OIG to continue to focus on stewardship by completing audits that ensure the correct person is paid and benefit payments are accurate by:

- Performing additional data matches with States and other localities and third parties to identify payments made to individuals who are not eligible for benefits;
- Reviewing SSA's processes to ensure SSI and OASDI applicant claims are accurately and timely processed; and
- Evaluating processes such as work and earnings reporting that impact payment accuracy to identify the root cause of errors and challenges SSA faces in resolving overpayments.

Prior work in these areas has uncovered improper payments and internal control issues. For example, SSA OIG issued a December 2024 report that matched death information from New York City against SSA records and a March 2025 report that matched death information from Idaho against SSA records. These reports estimated that SSA issued $90 million and $5.5 million in improper payments after the beneficiaries' deaths.

In May 2024, SSA OIG also completed an audit to match U.S. Department of State death information against SSA records that identified 1,596 current or suspended payment status beneficiaries who were deceased according to State Department death data. We estimated that SSA issued approximately $37.8 million in payments to beneficiaries who were deceased according to State Department death data.

Challenges recovering SSI overpayments and benefit eligibility impacts

For many years, SSA OIG audits have made recommendations to help ensure SSA collects overpayments timely and uses available tools to collect overpayments.[1] In July 2024, SSA OIG

[1] See the following reports: Old-Age, Survivors and Disability Insurance Overpayments Pending Collection (A-02-15-35001); Overpayments Not Collected Through Benefit Withholding (A-07-18-50278); Cross-program Recovery to Collect Overpayments (A-13-15-15029); Old-Age, Survivors and Disability Insurance Debtors Who Were Not Current on an Installment Agreement (A-04-18-50265); Status of Title II Installment Agreements (A-02-08-18074); Supplemental Security Income Overpayments (A-01-04-24022).

issued a report that identified instances where SSA did not follow its policies or use all available tools to prevent, detect or recover SSI overpayments for 1.9 million recipients. SSA OIG made nine recommendations to improve SSA's use of policies and available tools.

In addition, SSA OIG audit work helps identify some of the sources of such improper payments. For example, in April 2024, we issued a report to determine whether SSA properly updated payment records to prevent improper payments when individuals changed their name because of marriage. We estimated SSA improperly paid 16,631 SSI recipients and OASDI beneficiaries approximately $240.9 million when there was a name change because of marriage. One of the recommendations from this report was for SSA to evaluate the feasibility of obtaining electronic marriage data to match against SSI and OASDI payment records to prevent improper payments. In May 2024, we issued a report that found SSA's controls did not always identify Illinois or Texas workers' compensation benefits paid to Disability Insurance (DI) beneficiaries and SSI recipients. As a result of this audit, we estimated SSA issued approximately $28.6 million in overpayments and recommended SSA evaluate the feasibility of a legislative proposal requiring States to provide workers' compensation payment information to SSA.

Follow-up on prior audits and recommendations

SSA OIG conducts follow-up audits to ensure action has been taken on recommendations to address improper payments and other significant problems within SSA. For example, in July 2024, we issued a report to determine whether SSA had taken corrective action in response to the recommendation in our September 2016 review, *Numident Death Information Not Included on the Death Master File*. Although we made several new recommendations, we found that as part of its Continuing Death Data Improvements clean-up project, SSA took corrective action on approximately 7.7 million of the 8.7 million records we identified in our 2016 report and now includes those numberholders' death information in the full Death Master File (DMF). However, SSA continued to exclude from the DMF information on 941,383 numberholders with death information on the Numident, and we disagreed with SSA's rationale for the continued exclusion from the DMF for most of those records.

In July 2024, SSA OIG issued another report that summarized our prior audit work related to SSA's efforts to prevent, detect, and recover improper payments. In 2025, we began an audit to determine whether SSA's corrective actions in response to our prior audit recommendations effectively improved its monitoring and collection of court-ordered restitutions. Also in 2025, we began an audit to follow-up on prior recommendations related to capturing the average cost to collect overpayments and determine whether there are actions SSA could take to improve the processing of low-dollar overpayments.

Identify and prevent improper payments

SSA OIG continues to oversee the SSI and OASDI programs through various audits. Each quarter, our Audit Work Plans include a number of audits we plan to begin related to improper payments. In addition, Inspectors General are required to review their respective agencies' improper payments and high-dollar overpayment reporting requirements. In May 2024, SSA OIG issued a report on SSA's FY 2023 compliance with the Payment Integrity Information Act of 2019 (PIIA). In FY 2023, SSA complied with nine PIIA reporting requirements, but SSA did not comply with one PIIA reporting requirement when it failed to demonstrate improvements to payment integrity or reach a tolerable improper payment and unknown payment rate for the SSI and OASDI programs.

SSA must be a responsible steward of the funds entrusted to its care by minimizing the risk of making improper payments and recovering overpayments when they occur. Preventing improper payments is more advantageous than recovering them because the agency has to expend additional resources to recover the overpayments or process additional payments to rectify underpayments. SSA OIG continues to prioritize audit work that will help SSA identify and prevent improper payments. For example, in February 2024, SSA OIG issued a report that found SSA did not accurately or timely pay beneficiaries subject to the earnings test. We estimated SSA inaccurately calculated approximately 47,000 of the 294,000 earnings-test overpayments established in FY 2021, totaling more than $148 million, and did not timely pay approximately 176,000 beneficiaries $81 million in monthly benefit increases they were due. We made 10 recommendations that will help SSA improve its administration of the earnings test going forward.

Detecting and Preventing Social Security Disability Fraud

CDI Program

In addition to the request for $114.7 million for direct base appropriations, the FY 2026 Budget requests SSA transfer **$24.6** million from SSA's LAE program integrity adjustment, which funds the CDI Program, to the SSA OIG for the SSA OIG's direct costs of leading the jointly operated anti-fraud CDI Program. This funding level represents an increase of $9.5 million over the FY 2025 enacted level of $15.1 million to fund additional support for our CDI units.

The CDI Program is an anti-fraud initiative that promotes the integrity of SSA's disability programs. The CDI Program accomplishes its mission, in part, by closely examining questionable disability claims to stop payment before disability fraud occurs. The program also conducts criminal investigations of in-pay beneficiaries suspected of committing disability fraud, as individuals may have feigned physical impairments, concealed work activity, or failed to report other benefits or earnings to receive disability benefits they are not entitled to receive. In all cases, CDI obtains factual evidence sufficient to resolve questions of fraud and abuse in SSA's disability programs. Each CDI unit consists of an SSA OIG special agent who serves as a team leader, and personnel from SSA, State DDS, and State or local law enforcement partners. CDI units combine Federal and State resources and expertise to benefit not only Social Security programs, but also other Federal and State programs, such as food and nutrition assistance, housing assistance, Medicare, and Medicaid.

The Bipartisan Budget Act of 2015 mandated CDI coverage to all 50 states and U.S. territories by October 2022, subject to law enforcement availability. Today, 50 CDI units cover all 50 States, the District of Columbia, Puerto Rico, and all U.S. territories. Since the program's inception, CDI investigations have contributed to a projected savings to taxpayers of more than $8.1 billion. Accomplishments of the CDI Program include the following:

Category	October 1, 2024 – March 31, 2025	October 1, 2023 – September 30, 2024
Disability claims denied or ceased	620	1,188
Projected savings for SSA programs	$41.5 million	$80.6 million
Projected recoveries for SSA programs	$11.9 million	$15.5 million
Projected savings for non-SSA programs	$45.7 million	$101.6 million

SSA OIG is committed to the success of the CDI Program by increasing oversight and improving operations through dedicated leadership and management. To provide national investigative oversight of the CDI Program and meet the operational demands of the nationwide coverage, SSA OIG increased the number of employees supporting the program from 54 in 2022 to 64 in 2024.

As of May 2025, 17 CDI units are operating without a law enforcement partner. Operating CDI units without full partner participation threatens the success and impact of this critical program integrity initiative by decreasing investigative capacity and delaying timely disability determinations. Despite direct outreach to State governors by the Commissioner of SSA and SSA OIG, no new partners were acquired. This $9.5 million additional transfer authority will provide the CDI program with an additional **17 FTEs** and facilitate a solution to the law enforcement recruitment and retention challenges without additional appropriations or increasing the overall cost of the program, as these are program integrity funds already appropriated for SSA to pay for law enforcement partners. We will use the additional funding transferred to OIG to cover increases to CDI operational and personnel costs, as well as directly hire investigative personnel to support units without a law enforcement partner.

Legal Oversight: Enforcing the Social Security Act

Combatting Section 1140 violations

SSA OIG combats Section 1140 violations involving imposter websites, emails, telephone solicitations, U.S. mail, radio, television, Internet broadcasts, app stores, and social media platforms through education and enforcement. SSA OIG educates businesses and individuals, assists entities and individuals in understanding and complying with Section 1140, and, as appropriate, takes civil enforcement and/or other corrective action, against entities operating in violation of Section 1140. This work protects the public from being misled about their rights to benefits, ensure those Social Security benefits obtained improperly are returned to the Social Security Trust Funds, and that the tax-payer dollars inappropriately used to process improper claims are recovered. The return of monies to the Trust Funds and General Treasury protects the public's rights to Social Security benefits.

In FY 2026, SSA OIG will continue to issue take-down requests for fraud and imposter websites and social media pages that violate Section 1140. SSA OIG will pursue entities that send misleading mailers, call centers and corporations that engage in fraudulent or misleading phone campaigns, and telecommunications companies that transit SSA-related scam calls into the country from overseas. Further, due to the increase in AI-related fraud scams, like generative AI and voice cloning, SSA OIG will continue utilizing data collected on AI-enabled Section 1140 violations, and bringing Section 1140 actions in these matters as warranted.

Strategic Goal 3: Optimize Operations

SSA OIG's third strategic goal is to optimize operations through five key initiatives: (1) intragovernmental collaboration; (2) modernizing information technology systems; (3) data analytics; (4) cybersecurity; and (5) cost-saving efforts.

Intragovernmental Collaboration

DOJ, Civil Division, and other Federal Law Enforcement Agencies on Imposter Scams and Elder Justice Initiatives

SSA OIG continues to collaborate with other agencies in the fight against fraud in its programs and operations, and against its beneficiaries. SSA OIG is an active member of the DOJ Elder Justice Initiative, which brings together and facilitates coordination among numerous State, local, and Federal entities with capabilities and authority to fight elder fraud and elder abuse. SSA OIG is also involved with several regulatory agencies in the fight against SSA-related fraud, chiefly the Federal Trade Commission, and an anti-fraud working group formed under auspices of the Federal Communications Commission to combat phone scams.

SSA OIG is also enhancing its analytical capabilities to identify clusters of direct deposit fraud by leveraging data from three primary sources: the Social Security Administration, SSA OIG's Case Management System, and the Department of the Treasury, Bureau of Fiscal Services (BFS). This allows SSA OIG to acquire transactional data from the SSA's Enterprise Metadata Repository (EMR) for all recent direct deposit changes and then query our case management system to search for allegations related to the most used bank accounts identified from EMR. SSA OIG then sends the most used bank accounts, corroborated with fraud allegations, to the BFS to acquire non-receipt information and identify other possible government payments made to the same accounts.

This comprehensive approach enhances our ability to detect and prevent fraudulent activities, optimize resources, and improve the accuracy of fraud detection. By integrating data from multiple sources and using advanced analytical tools, SSA OIG ensures a more effective and efficient response to combating direct deposit fraud.

CIGIE Committees

SSA OIG also participates in committees, subcommittees, and workgroups under the auspices of CIGIE, including the CIGIE Chief Information Officer (CIO) Council, CIGIE Cybersecurity Workgroup and other investigations and training committees. These partnerships facilitate collaboration within the IG community to share best practices, training, and professional development opportunities. SSA OIG will continue to pursue new partnerships and collaborations strategically and proactively in FY 2026.

Law Enforcement Collaboration

SSA OIG proactively shares data, information, and best practices with partner organizations to support a government-wide approach to combatting fraud and protecting American citizens. In June 2021, SSA OIG began sharing information collected via its online imposter scam complaint form with the Federal Trade Commission's Consumer Sentinel Network. SSA OIG also shares reports of COVID-19 pandemic-related unemployment insurance fraud with the U.S. Department of Labor OIG.

SSA OIG regularly collaborates with the Federal Bureau of Investigation on joint investigations, bringing a wealth of data and expertise in identity-related matters. One such investigation involved a Mexican national, previously deported from the United States on two occasions, who assumed the identity of a deceased U.S. citizen to obtain multiple U.S. passports. Using the stolen identity, he fraudulently applied for and received over $88,000 in Social Security Retirement Insurance Benefits. Beyond the benefits fraud, the individual engaged in the production and nationwide distribution of counterfeit identification documents, including fraudulent Social Security cards. After pleading guilty to conspiracy to distribute false identity documents and aggravated identity theft, he was sentenced to 54 months' incarceration and 3 years' supervised release. He was also ordered to be deported upon completion of his prison sentence.

SSA OIG actively participates on the U.S. Department of Homeland Security, Homeland Security Investigations (HSI), Document and Benefit Fraud Task Forces around the country. These task forces focus on investigating use and trafficking of illegal documents and SSNs, as well as the fraudulent application and receipt of government benefits by those not eligible to receive them. We have also permanently embedded our most senior analyst with the HSI Cross Border Financial Fraud Crime Center where we work jointly on matters related to illegal immigration, transnational organized crime, and worksite enforcement.

Our Boston agents along with our HSI partners investigated a referral from the U.S Attorney's Office alleging that a former Bosnian prison camp supervisor and a former Bosnian combatant used fraudulent documents to obtain an SSN and U.S. citizenship.

The two Bosnian nationals originally came to the United States as refugees in the 1990's falsely claiming to be half-brothers. Furthermore, both men falsely claimed they had been the subject of persecution by Serbian forces during the Bosnian War stating, among other things, that Serbian forces had captured, interrogated, beaten, and forced them to pull wounded soldiers from the front lines.

Once in the United States, the former Bosnian combatant continued to make false statements about his past, including that he had never assisted anyone enter the country illegally, when in fact, he assisted the Bosnian prison camp supervisor to enter into the United States by falsely claiming they were half-brothers.

The Bosnian prison camp supervisor engaged in a 25-year scheme to conceal his involvement in the persecution of Serbian prisoners at the notorious Celebici prison camp in Bosnia in 1992. He served as a supervisor of the guards at the prison camp and twenty-one former detainees described him as one the most notable guards at the camp, who was widely known for his particularly vicious treatment of prisoners.

One of the defendants, the former Bosnian combatant, pled guilty to passport fraud was sentenced to 18 months of probation and following a two-week trial, the former Bosnian prison camp supervisor was convicted of making false statements, passport fraud, use of a fraudulently obtained naturalization certificate, and possession and use of a fraudulently obtained authorization document. He was subsequently sentenced to 65 months in Federal prison.

Our Orlando agent along with our HSI partners investigated a Florida man who fraudulently obtained a Florida identification card, Social Security card, and birth certificate, using a victim's identity in the 1990s. Without the victim's knowledge or consent, the man used the stolen identity to unlawfully obtain various government benefits, including a driver's license, Social Security Disability Benefits, and Supplemental Nutrition Assistance Program (SNAP) benefits. After pleading guilty to theft of government funds and identity theft, he was sentenced to 45 months' incarceration and ordered to pay restitution of $22,024 to the SSA and $20,239 to the U.S. Department of Agriculture (USDA).

Further, SSA OIG leadership serves as members on Joint Terrorism Task Forces executive boards throughout the nation.

Modernizing Information Technology Systems

SSA OIG continues to make significant progress in modernizing and transforming applications that support our investigative processes and workloads as well as administrative lines of business applications. In FY 2024, SSA OIG used dedicated IT modernization funding for critical enhancements to our Enterprise suite of existing applications. To fulfill OIG's investigative mission, IT specialists and contractors continued to perform necessary maintenance and enhance the Investigative Case Management System to ensure a secure, stable, and scalable platform. We also made enhancements to our administrative human resources, budget, training, and property management applications to support the business mission.

In FY 2024, SSA OIG designed, developed, and implemented an IT Change Management System to increase operational process efficiencies. We also redesigned the web forms used by the public to report alleged fraud and imposter scams to improve the user experience.

We will continue to execute our multi-year IT Modernization plan in FY 2025 and beyond. We will continue to retire antiquated applications while simultaneously responding to our customer's evolving needs.

SSA OIG continues to implement technological advancements such as Natural Language Processing (NLP) in our Investigative Case Management System's workflow processes to maximize the efficiency of our investigative resources. Using advanced analysis and logic-based

techniques allows us to increase automation, thereby reducing human resources which can be re-allocated to different areas of investigative field work.
Incorporating NLP has resulted in a significant reduction in the number of allegations for manual review. Some allegation types now rely solely on NLP for categorization without any manual review. NLP is currently triaging approximately 40 percent of all allegations submitted to SSA OIG. From that subset, less than 10 percent are being manually validated to ensure continued model accuracy. Our agile process allows us to adjust the percentages based on error rates and continue to incorporate additional topics into NLP in the Investigative Case Management System's workflow process.

In FY 2026 and beyond, SSA OIG will also continue to leverage emerging technologies and introduce modernizations that improve usability and functionality and enhance our business processes. Adoption of emerging technologies such as cloud platforms require that we modernize our application and platform architecture to optimize security, performance, agility, and scalability. In FY 2025, SSA OIG will implement application platform architectural improvements to eliminate use of old technologies in our systems. We will deploy these mandatory enhancements to all of our systems as we transition to a cloud hosted environment. Using cloud managed solutions will aid SSA OIG in minimizing future application maintenance and allowing easier enhancements.

As we continue to invest in IT modernization and advance our capabilities, it is imperative that we also make investments in employee technical trainings that will provide our IT staff with a broader spectrum of tools and enhance their skills in low code/no code platforms, and skills in cloud capabilities to effectively transition and use these emerging technologies.

Data Analytics

SSA OIG's data objects were released into production in early 2024. These data objects provide refined and reconciled data from the Investigative Case Management System and allow for real-time ad hoc data requests as well as enhanced efficiency in mission-critical business intelligence reporting. In FY 2025, we significantly expanded our data objects and incorporated the creation of a third phase in the Case Management System – preliminary assessments. We expanded the scope of snapshots to include all data leveraged for official reporting purposes for both reproducibility and the expansion of our data analytics warehouse.

In FY 2025, several key enhancements took place regarding reporting tools. The expansion of the underlying data objects reduced, and in some cases eliminated, calculations done within our reporting software, MicroStrategy, which resulted in reduced processing times. Additional work was undertaken to meet the needs of our customers and provide additional business intelligence reports. In FY 2026, SSA OIG plans to construct position-related dashboard landing pages focusing on the needs of individual customers as they operate within their components. In addition, we will continue providing data drill-down and filtering capabilities, allowing SSA OIG to leverage data in innovative ways, enhancing efficiency and accessibility.

In FY 2026, we will continue expanding the data analytics platform to provide self-service tools and data access to our customers. Thus far, we created an initial set of index files for seven of the major data streams from SSA utilized by auditors and investigators to meet Strategic Goal #2. In the remainder of FY 2025, we will work collaboratively with auditors and investigators to test and deploy the initial index files so that in FY 2026 we can explore additional automation and continue to enhance the platform. We created several automated tools enabling investigators to run queries that generate automatic results, like representative payee files and direct deposit information. We plan to add additional self-service tools that will enable customers to extract data pertaining to FBI missing persons cases, immigration and other law enforcement endeavors, as well as aged beneficiaries.

Cybersecurity

As cyber threats evolve, SSA OIG must continue to enhance the security posture of our enterprise applications and develop staff skillsets.

SSA OIG is committed to advance toward zero-trust architecture to ensure least-privileged access to OIG's enterprise applications and data. In FY 2024, we enhanced our systems to implement phishing resistant Multi-Factor Authentication models.

SSA OIG continues to facilitate intercomponent coordination, education, and exchange of cyber efforts through the SSA OIG Cybersecurity Workgroup. As cyber threats evolve, SSA OIG continues to remediate security vulnerabilities and manage security assessment activities to ensure continued compliance with Federal regulations and agency policy.

In addition, audit reviews are conducted per the standards of the Federal Information Security Modernization Act (FISMA) of 2014. The evaluation and effectiveness of SSA's information security program is based on the prescribed IG FISMA Reporting Metrics. Evaluation includes testing the effectiveness of information security policies, procedures, and practices of some of SSA's information systems.

SSA OIG continues to be a contributing member of the SSA Insider Threat Hub, providing valuable cyber and investigative expertise during inquiries of mutual interest.

Cost-saving Efforts

SSA OIG remains committed to maximizing its resources through several cost-saving efforts, including analyzing options to utilize space efficiently, reduce wasteful spending and ensure compliance with return-to-work policies.

In FY 2025, SSA OIG continues to collaborate with SSA in identifying unused SSA space that OIG investigators may use, as leases expire. For example, construction was completed in a Field Office in Las Vegas, Nevada that allowed SSA OIG to vacate a Federal space and move in with the CDI Unit, saving taxpayer's funds. Additionally, SSA OIG is collaborating with SSA to collocate investigative agents and the CDI Unit in St. Louis, Missouri and collocating SSA CDI staff and SSA OIG staff in Boston, Massachusetts. These projects will result in reduced footprint and rent costs for both SSA OIG and SSA. OIG will continue to review properties across the country and collaborate with SSA to identify where space reductions are feasible.

SSA OIG also enhances organizational efficiencies by centralizing logistical and operational efforts and identifying efficiencies in processes. For example, over the last 4 years, SSA OIG has also worked with SSA to transfer all nationwide existing local phone lines to a central SSA contract. As part of this process, SSA OIG has identified local phone lines no longer needed or used and eliminated phone expenses in most locations nationwide.

Strategic Goal 4: Strengthen our workforce

SSA OIG's fourth strategic goal is focused on strengthening our workforce within SSA OIG and aligning our workforce and organizational structure with the priorities of the Administration and our statutory obligations. SSA OIG is committed to building an innovative and agile organization by attracting, developing, and retaining a high-performing workforce and providing them the resources to maximize their individual potential and improve operations. In FY 2025, SSA OIG conducted a comprehensive top-down review of our operations, staffing, and performance needs to further maximize our ability to efficiently accomplish our statutory mission. As a result, we developed a data-driven workforce plan that prioritizes hiring in areas of greatest need in accordance with mandates set forth in the Administration's Executive Orders and directives.

Employee Performance and Development

To ensure an efficient and merit-based workforce, SSA OIG continues to prioritize increasing productivity and accountability in accordance with the following Executive Orders and Presidential Memorandum:

- Executive Order 14170: Reforming The Federal Hiring Process And Restoring Merit To Government Service
- Executive Order 14173: Ending Illegal Discrimination And Restoring Merit-Based Opportunity
- Executive Order 14284: Strengthening Probationary Periods in the Federal Service
- Presidential Memorandum, Restoring Accountability for Career Senior Executives

To develop and maintain a workforce capable of responding to future demands, SSA OIG leadership continues to empower its managers to consider and approve job-specific trainings and programs that will increase employee knowledge, skills, and abilities to help them carry out their assigned roles and responsibilities.

SSA OIG 1811 Training Programs:

As fraudsters become more sophisticated in their tactics, training of SSA OIG's federal agents is vital, not just for the quality of our investigations, but also for officer and public safety. Without appropriate funding, our agents become less agile in their ability to respond to emerging fraud schemes, such as imposter scams, potential threats posed by AI, and direct deposit fraud, in a timely manner that protects the American public.

The SSA OIG is responsible for investigating threats and assaults against Social Security Administration employees, visitors, and facilities. This includes potentially responding to active shooter or threat situations. SSA OIG's FY 2026 budget request includes funding for an active shooter training initiative with the Advanced Law Enforcement Rapid Response Training Center at Texas State University to provide the best research-based active shooter response training in the nation.

In addition, in FY 2026, SSA OIG will continue funding new agent training, new manager trainings, realistic de-escalation, and tactical medical trainings for an estimated 240 special agents.

Government Vehicles

The SSA OIG leases a fleet of vehicles from the General Services Administration. Historically, the SSA OIG has leased standard sedans or small sport utility vehicles and equipped them with aftermarket law enforcement equipment. As these vehicles have become more intricate, the aftermarket instillation of law enforcement and emergency equipment such as lights and sirens has become increasingly complex, uneconomical, and in many instances the ability to mount the equipment in safe, but concealed location has been significantly diminished. Additionally, we have had several issues involving our standard leased vehicles where electrical malfunctions occurred after installing aftermarket equipment, rendering the vehicles inoperable. Some of the aftermarket installations have also created safety hazards for the operators and passengers in the vehicles. To ensure the aftermarket installation of equipment does not decrease the safety of operation of vehicles, the OIG has a need to transition to leasing "Police Use Vehicles" from GSA at an increased expense at approximately **$150,000** a year. This will ensure compliance with by Executive Order 14240: *Eliminating Waste and Saving Taxpayer Dollars by Consolidating Procurement* and ensure the vehicles come with the necessary law enforcement equipment factory installed that complies with the executive order while supporting unique business needs of our special agents, increasing safety, and reducing downtime.

Recruitment Efforts

SSA OIG is committed to fulfilling our statutory responsibilities by ensuring we retain and recruit staff that enables our workforce to meet the demand for independent, high-quality oversight. For our components performing statutory obligations related to investigations, law enforcement, and audit work, the Offices of Investigations and Audit requires additional staffing to maintain our current productivity levels and mandated workloads. SSA OIG developed a data-driven hiring plan that prioritizes recruitment of positions that will improve the efficiency of the Federal government. Our recruitment efforts will be focused on the following principles in accordance with Executive Order 14170: Reforming the Federal Hiring Process And Restoring Merit To Government Service:

- decrease government-wide time-to-hire to under 80 days
- improve communication with candidates to provide greater clarity regarding application status, timelines, and feedback, including regular updates on the progress of applications and explanations of hiring decisions where appropriate

- integrate modern technology to support the recruitment and selection process, including the use of data analytics to identify trends, gaps, and opportunities in hiring, as well as leveraging digital platforms to improve candidate engagement

BUDGETARY RESOURCES

The SSA OIG annual appropriation consists of appropriations from both the general fund and the trust funds. The President's Budget for FY 2026 consists of $32,000,000 appropriated from the general fund, and $82,665,000, which will be transferred and expended as authorized by Section 201(g) (1) of the Social Security Act from the Federal Old-Age and Survivors Insurance Trust Fund and the Federal Disability Insurance Trust Fund. The table below displays budget authority, split by type of funding, and obligations.

Table 4.1—OIG Budget Authority and Amounts Available for Obligation

	FY 2024 Actual	FY 2025 Estimate	FY 2026 President's Budget	*FY25 to FY26 Change*
FTE	508	479	471[1]	(8)
General Fund Appropriation	$32,000,000	$32,000,000	$32,000,000	$0
Trust Fund Appropriation	$82,665,000	$82,665,000	$82,665,000	$0
Subtotal [2]	**$114,665,000**	**$114,665,000**	**$114,665,000**	**$0**
No-Year Carryover (IT Mod)	$1,961,476	$543,180	$0	($543,180)
Program Integrity Transfer [3]	$15,100,000	$15,100,000	$24,600,000	$9,500,000
Program Integrity Carryover [4]	$281,569	$0	$0	$0
Total Authority:	**$132,008,045**	**$130,308,180**	**$139,265,000**	**$8,956,820**
Total Obligation[5]	$131,042,979	$129,754,795	$135,760,150	$6,005,355
Unobligated balance lapsing	$421,886	$553,385	$0	$0

[1] Based on point-in-time estimates from April 2025.
[2] Of the amount, $2 million is available for IT Modernization in each year.
[3] P.L. 118-47 allowed SSA to transfer $15.1 million in FY 2024 from the LAE account to the OIG for the costs associated with jointly operated CDI units. P.L. 119-4 allowed SSA to transfer $15.1 million in FY 2025 from the LAE account to the OIG for the costs associated with jointly operated CDI units. FY 2026 estimates reflect a transfer of $24.6 million, as reflected in the FY 2026 President's Budget.
[4] SSA OIG's PI adjustment is an 18-month account. The carryover represents the unobligated funds that will be obligated within the first six months of the following fiscal year.
[5] Total Obligations for IT Modernization include $3.4 million in FY 2024, $2.5 million in FY 2025 and $1 million in FY 2026.

Table 4.3—Explanation of OIG Budget Changes

	FY 2025		FY 2026		Change	
	WYs (FTEs)	Obligations	WYs (FTEs)	Obligations	WYs (FTEs)	Obligations
<u>**BUILT-IN INCREASES**</u>						
Payroll Expenses	**479**	*$114,664,700*	**471**	*$111,881,600*	**-**	*($2,783,100)*
·Change in base payroll expenses related to career ladder promotions and within-grade increases	-	-	-	*$309,400*	-	*$309,400*
· Change in base expenses for employee benefits including health benefits and new employees hired under the Federal Retirement Employees System	-	-	-	*$405,000*	-	*$405,000*
Non-Payroll Costs - All other built-in non-payroll changes, travel management support and equipment	-	*$10,672,100*	-	*$18,807,700*	-	*$8,135,600*
Rent	-	*$4,418,000*	-	*$4,418,000*	-	*$0*
Subtotal, Built-in increases	**479**	***$129,754,800***	**471**	***$135,821,700***	**-**	***$6,066,900***
<u>**PROGRAM INCREASES**</u>						
Payroll Increase - Net Increase in OIG WYs	-	-	*0*		0	*$0*
Subtotal, Program Increases	**-**	**-**	*0*	*$0*	*0*	*$0*
Total Increases	***479***	***$129,754,800***	***471***	***$135,821,700***	***0***	***$6,066,900***

Office of the Inspector General

	FY 2025		FY 2026		Change	
	WYs (FTEs)	Budgetary Resources	WYs (FTEs)	Budgetary Resources	WYs (FTEs)	Budgetary Resources
BUILT-IN DECREASES						
Base Payroll Expenses—Decrease in all other payroll costs	-	-	-	-	-	-
Non-Payroll Costs						
Rent				*($61,600)*		*($61,600)*
Subtotal, Built-in decreases	*0*	*0*	*0*	*($61,600)*	*0*	*($61,600)*
PROGRAM DECREASES						
Decrease in costs for training, other support, services, and supplies	-	-	***0***	-	-	-
Subtotal, Program Decreases	*0*	*0*	*0*	*0*	*0*	*0*
Total Decreases	***0***	***$0***	***0***	***($61,600)***	***0***	***($61,600)***
Net Change[1]	**479**	***$129,754,800***	**471**	***$135,760,100***	**(8)**	***$6,005,300***

Note: 2026 FTEs are based on point-in-time estimates from April 2025.

[1] Total includes funding from Program Integrity Transfer and IT Modernization no-year funding.

Table 4.4—Budget Resources by Object

	FY 2024	FY 2025	FY 2026	*FY25 to FY26 Change*
Full-time permanent	$79,641,000	$80,601,900	$78,817,200	*($1,784,700)*
Other than full-time permanent	$459,800	$106,100		*($106,100)*
Other compensation				
Subtotal, Personnel Compensation	$80,100,800	$80,708,000	$78,817,200	*($1,890,800)*
Civilian personnel benefits	$35,727,100	$33,956,700	$33,778,900	*($177,800)*
Total, Compensation and Benefits	$115,827,900	$114,664,700	$112,596,100	*($2,068,600)*
Travel	$2,032,000	$2,326,000	$2,751,000	*$425,000*
Transportation of things	$66,100	$58,000	$69,000	*$11,000*
Rental payments to GSA	$3,768,000	$3,999,000	$3,885,000	*($114,000)*
Rental payments to others	$101,000	$119,000	$137,000	*$18,000*
Communications, utilities, and others	$335,000	$299,000	$334,000	*$35,000*
Printing and reproduction	$1,000	$2,000	$9,000	*$7,000*
Other services	$7,997,000	$7,135,000	$13,898,000	*$6,763,000*
Supplies and materials	$143,000	$100,000	$132,000	*$32,000*
Equipment	$791,000	$1,052,000	$1,949,000	*$897,000*
Insurance Claims	$1,000	$0	$0	*$0*
Land and Structure	$0	$0	$0	*$0*
Total Budgetary Resources[1]	**$131,043,000**	**$129,754,700**	**$135,760,100**	***$6,005,400***

Table 4.5—FTE Employment and WYs

	FY 2024 Actual	FY 2025 Estimate	FY 2026 President's Budget
FTE	508	479	471[2]
Overtime / Lump Sum Leave	4	9	5
Total:	**512**	**488**	**476**

[1] Total includes funding from Program Integrity Transfer and IT Modernization no-year funding.
[2] Based on point-in-time estimates from April 2025.

Table 4.6—Average Grade and Salary

	FY 2024 Actual
Average ES	$207,000
Average GS	13
Average GS Salary	$136,800

APPROPRIATION HISTORY

The table below displays the President's budget request, amounts passed by the House and Senate, and the actual amount appropriated for the period FY 2015 to FY 2025.

Table 4.7—Appropriation History Table

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
General Funds	$29,000,000	$28,829,000		**$ 29,000,000**
Trust Funds	$75,622,000	$74,249,000		**$ 74,350,000**
2015 Total	$104,622,000	$103,078,000[1]		**$103,350,000**[2]
General Funds	$31,000,000	$30,000,000	$28,829,000	**$ 29,787,000**
Trust Funds	$78,795,000	$78,795,000	$74,521,000	**$ 75,713,000**
2016 Total	$109,795,000	$108,795,000[3]	$103,350,000[4]	**$105,500,000**[5]
General Funds	$31,000,000	$29,787,000	$29,787,000	**$ 29,787,000**
Trust Funds	$81,000,000	$75,713,000	$75,713,000	**$ 75,713,000**
2017 Total	$112,000,000	$105,500,000[6]	$105,500,000[7]	**$105,500,000**[8]
General Funds	$30,000,000	$29,796,270	$29,796,270	**$30,000,000**
Trust Funds	$75,500,000	$74,987,280	$74,987,280	**$75,500,000**
2018 Total	$105,500,000	$104,783,550[9]	$104,783,550[10]	**$105,500,000**[11]
General Funds	$30,000,000	$31,000,000	$30,000,000	**$30,000,000**
Trust Funds	$75,500,000	$77,500,000	$75,500,000	**$75,500,000**
2019 Total	$105,500,000	$108,500,000[12]	$105,500,000[13]	**$105,500,000**[14]
General Funds	$30,000,000	$31,000,000	$30,000,000	**$30,000,000**
Trust Funds	$75,500,000	$77,500,000	$75,500,000	**$75,500,000**
2020 Total	$105,500,000	$108,500,000[15]	$105,500,000[16]	**$105,500,000**[17]
General Funds	$33,000,000	$31,000,000	$30,000,000	**$30,000,000**
Trust Funds	$83,000,000	$77,500,000	$75,500,000	**$75,500,000**
2021 Total	$116,000,000	$108,500,000[18]	$105,500,000[19]	**$105,500,000**[20]
General Funds	$32,000,000	$32,000,000	$32,000,000	**$30,900,000**
Trust Funds	$80,000,000	$80,000,000	$80,000,000	**$77,765,000**
2022 Total	$112,000,000	$112,000,000[21]	$112,000,000[22]	**$108,665,000**[23]
General Funds	$33,000,000	$33,000,000	$32,000,000	**$32,000,000**
Trust Funds	$84,500,000	$84,500,000	$82,665,000	**$82,665,000**
2023 Total	$117,500,000	$117,500,000[24]	$114,665,000[25]	**$114,665,000**[26]
General Funds	$34,000,000	$32,000,000	$32,000,000	**$32,000,000**
Trust Funds	$86,400,000	$82,665,000	$82,665,000	**$82,665,000**
2024 Total	$120,400,000	$114,665,000	$114,665,000	**$114,665,000**[27]
General Funds	$34,000,000	$32,000,000	$32,000,000	**$32,000,000**
Trust Funds	$87,254,000	$82,665,000	$82,665,000	**$82,665,000**
2025 Total	$121,254,000	$114,665,000	$114,665,000	**$114,665,000**[28]
General Funds	$32,000,000			
Trust Funds	$82,665,000			
2026 Total	$121,254,000			

[1] H.R. 5464.
[2] Consolidated Appropriations Act, 2015 (P.L. 113-235).
[3] H.R. 3020
[4] S. 1695.
[5] Consolidated Appropriations Act, 2016 (P.L. 114-113).
[6] H.R. 5926.
[7] S. 3040.
[8] Consolidated Appropriations Act, 2017 (P.L. 115-31).
[9] Further Additional Continuing Appropriations Act, 2018 (P.L. 115-56). Funding includes a rescission of 0.6791% of FY 2017 appropriation. The $30,000,000 in general funds and $75,500,000 in trust funds included in the language for this account for FY 2018 were reduced by $415,284 and $301,166 respectively, in accordance with P.L. 115-56.
[10] Further Additional Continuing Appropriations Act, 2018 (P.L. 115-56). Funding includes a rescission of 0.6791% of FY 2017 appropriation. The $30,000,000 in general funds and $75,500,000 in trust funds included in the language for this account for FY 2018 were reduced by $415,284 and $301,166 respectively, in accordance with P.L. 115-56.
[11] Consolidated Appropriations Act, 2017 (P.L. 115-56).
[12] H.R. 6157.
[13] H.R. 6157.
[14] Department of Defense and Labor, Health and Human Services, and Education Appropriations Act, 2019 and Continuing Appropriations Act, 2019 (P.L. 115-245).
[15] H.R. 1865.
[16] H.R. 1865.
[17] Departments of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Act, 2020 (P.L. 116-94).
[18] H.R. 133.
[19] H.R. 133.
[20] Departments of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Act, 2021 (P.L. 116-260).
[21] H.R. 4502
[22] H.R. 4502
[23] Consolidated Appropriations Act, 2022 (P.L. 117-103)
[24] H.R. 2617
[25] H.R. 2617
[26] Consolidated Appropriations Act, 2023 (P.L. 117- 328)
[27] Further Consolidated Appropriations Act, 2024 (P.L. 118-47)
[28] Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4)

Social Security Administration

Annual Performance Plan for Fiscal Year 2026

Revised Performance Plan for Fiscal Year 2025

Securing today
and tomorrow

Social Security Overview

Mission

Deliver timely and accurate Social Security services to the public.

Programs

We administer three programs under the *Social Security Act*, as amended:

- **Old-Age and Survivors Insurance (OASI):** Established in 1935, the OASI program provides monthly retirement and survivors benefits to qualified workers and their family members.
- **Disability Insurance (DI):** Established in 1956, the DI program provides monthly benefits for workers who become disabled and their families.
- **Supplemental Security Income (SSI):** Established in 1972, the SSI program provides monthly financial support to aged, blind, and disabled adults and children who have limited income and resources.

In addition, we support national programs administered by other Federal and State agencies, as required by law, such as Medicare, Supplemental Nutrition Assistance Program, State Children's Health Insurance Program, E-Verify, Medicaid, Federal Benefits for Veterans, and programs associated with the *Employee Retirement Income Security Act of 1974*, the *Coal Industry Retiree Health Benefit Act*, and the *Help America Vote Act*.

Organization

As of May 2025, about 52,000 Federal employees and 12,000 State employees served the public from a network of more than 1,500 offices across the country and around the world. We administer our programs and services online, by phone, by video, and in person in our offices. For more information about our organization and its functions, visit our organizational structure webpage.

Major Management Challenges

In FY 2024, the Office of the Inspector General (OIG) identified six major management and performance challenges for the agency: managing human capital, impediments to improving our service delivery methods, threats to ensuring the security of our information systems, improving the timeliness and accuracy of claims processing, improving the administration of our disability programs, and the prevention, detection, and recovery of improper payments. Strategic initiatives proposed in this plan provide a comprehensive overview of the actions we will take to address our challenges.

Program Evaluations

As required by the Foundations for Evidence-Based Policymaking Act of 2018, we developed the *FY 2026 Evaluation Plan* that describes our program evaluations in support our FY 2026 Performance Plan. This plan does not describe all evaluations that we will conduct in FY 2026, but it lays out our most significant evaluations and evidence building activities. Our planned internal evaluations of program data and research and analysis efforts, described in the *FY 2026 Evaluation Plan*, documents our primary sources of information and verifies the validity of data presented in this performance document.

Improve Customer Service

Optimizing the experience of our customers means we provide timely, accurate, and efficient access to our programs and services across our delivery channels. We will take actions such as modernizing our information technology, improving digital service delivery, and updating business procedures to more efficiently and effectively deliver services.

Leads: Deputy Commissioner for Disability Adjudication, Deputy Commissioner for External Affairs, Deputy Commissioner for Operations, and Chief Information Officer

Performance Measures and Targets

Fiscal Year Targets	FY 2025 Estimate	FY 2026 Estimate
Improve user experience for SSA's website	Achieve an 80% or greater satisfaction score for customers using SSA’s website	TBD
Collect customer feedback	Achieve a 2% increase in customer satisfaction based on the baseline customer experience scores for priority service designations established in FY 2024	TBD
Increase the number of successfully completed online transactions	Increase the number of successfully completed online transactions by 10 million over the prior year (estimated target of 451 million)	TBD
Modernize evidence acquisition systems to drive increased electronic medical evidence volumes through a multi-channel strategy	Acquire 58% of medical evidence electronically	TBD
Improve Processing Center (PC) OASDI Claims Timeliness[1]	Achieve a PC timeliness rate of 91.3%	TBD
Improve PC Administrative Law Judge[2] (ALJ) Favorable Reversals	Achieve a timely ALJ favorable decision PC processed rate of 97.8%	Achieve a timely ALJ favorable decision processed rate of 97.9%

[1] Retirement, Survivors, and Health Insurance (RSHI) claims processed in time for initial payment or within 10 days of receipt is considered timely. Disability claims processed in time for initial payment or within 16 days of receipt is considered timely.

[2] ALJ favorable reversals processed by the PCs within 60 days are considered timely.

What Do We Plan to Accomplish in FYs 2025 and 2026?

Modernize Information Technology (IT): We must move away from legacy IT systems to improve customer service. We will improve our service delivery by:

- providing new world-class online services and mobile apps with 24 hours a day, 7 days a week (24/7) availability;
- implementing a modern, unified platform for customer communication;
- simplifying customer interactions;
- developing technician-facing capabilities and platforms that incorporate modern technology and are integrated across service channels;
- shifting from localized workloads to portable, national workloads and evolving business processes; and
- leveraging efficient delivery models.

Please refer to our FY 2026 Congressional Justification for more details on FYs 2025 and 2026.

Enhance the Digital Experience: We must expand our digital landscape by investing in modern technology and integrating data and information sharing across our channels to deliver better service to our customers. We are evaluating our current online services, fixing the issues that persist, and offering new online services to our customers. In particular, we will:

- provide *my* Social Security account holders with secure digital access to their Social Security Number (SSN) by introducing a modernized and accessible alternative to the traditional physical SSN;
- implement stronger digital identification proofing measures to protect beneficiaries and their earned benefits;
- create mobile-ready online applications and make claim status information easily accessible for claimants;
- continue reviewing forms and policies to either remove signature requirements or allow electronic signature options;
- enhance Upload Documents, a tool that allows customers to directly provide documentation online, to include retirement, SSI, and disability-related forms and evidence;
- plan to expand Upload Documents to third parties, applicants, and business services online customers who want to initiate uploading forms and evidence via *my* Social Security and SSA.gov; and
- streamline the agency's handling of incoming mail, increase workflow efficiency, and improve timeliness and accuracy for processing pending actions, especially through increased use of Upload Documents and with our Mail Centralization and Digitalization initiative.

Improve 800 Number Services: Millions of our customers count on the convenience and accessibility of our National 800 Number and field office phones. More self-service options will ensure our customers' needs are being addressed faster. To address the long wait times that our customers are experiencing to speak with an agent, we are:

- rolling out to all our offices the modern, telecommunications platform that we successfully launched on our National 800 Number last year;
- providing training for our telephone agents on the new system to help them be productive and efficient;
- optimizing the performance of critical features on our new platform such as Estimated Wait Time, Call Back Assist, and Post-Call Survey; and
- utilizing artificial intelligence (AI) to enhance our Interactive Voice Response tools and encourage use of our chat bot feature, which shares valuable information from frequently asked questions published on our website.

Address Initial Disability Decision Wait Times: Improving the national average processing time for initial disability claims and reducing the number of older cases remains a priority for the agency. We aligned all disability functions under one component to improve organizational efficiency, including all Federal disability processing units and disability processing branches, as well as the office responsible for liaising with all State disability determinations services (DDS). This realignment improves oversight, accountability, and performance management by ensuring centralized management of examiners, first-level managers, and the cooperative disability investigations program. With our new structure, we are positioned to better manage workloads to improve public service, enhance quality, and ensure timely and consistent adjudication of disability claims and anti-fraud initiatives. Specifically, we are approaching this challenge from both a resource and business process perspective by:

- exploring alternate ways to transfer cases to disability processing sites;
- continuing to develop workload assistance partnerships between State DDSs that have excess capacity and those with the largest backlogs; and
- enhancing Federal capacity to support State DDSs with disability claims processing.

Expand Access to Electronic Medical Evidence: We offer medical providers multiple options to submit evidence electronically via our automated Health IT program, Electronic Records Express web portal, web services, and secure file transfer. We will increase the volume of medical evidence collected electronically to improve workflow efficiency, speed up the review of evidence, and expedite disability determinations by:

- increasing our use of Intelligent Medical Language Analysis Generation (IMAGEN), a tool that transforms evidence contained in the electronic disability folder into machine-readable text, allowing for enhanced search capabilities and intelligent analysis of medical records; and
- automating the onboarding process for large electronic health records vendors, which will expedite and improve the process for future vendors and provide quicker access to electronic evidence.

Address the Processing Center (PC) Backlog: Our PCs process highly complex cases that require non-automated processing. Improving capacity in our PCs will ensure that we can timely process

Retirement, Survivors, and Health Insurance claims and issue pending payments for ALJ reversals. To increase processing capacity, we are:

- reassigning headquarters employees to the PCs, which will increase staffing capacity to process complex claims;
- using robotic process automation software to automate high volume, labor-intensive, or repeatable tasks, allowing employees to focus their efforts on more complex actions; and
- automating additional PC workloads and modifying management workload practices to reduce the volume of actions that require technician intervention for resolution, allowing PCs to increase their focus on priority workloads.

Increase Appointment Focused Service (AFS): We are working to fully transition to an AFS delivery model in our field offices to enhance our service delivery and improve the customer experience. By scheduling appointments for in-person transactions, we will better manage the flow of in-person traffic, minimize in-person wait times, promote online and automated services, and ensure that staff can focus on delivering quality service to each customer. We will analyze data trends and share our data and ongoing analysis about this service change publicly.

Fight Fraud and Waste

Program integrity remains a central focus for our agency, as it strengthens our programs by ensuring we are paying the right people the correct amounts in a timely manner. We seek ways to do business better by addressing the root causes of improper payments, improving payment accuracy, enhancing fraud prevention and detection, and applying sound management principles to everyday work.

Leads: Deputy Commissioner for Disability Adjudication, Deputy Commissioner for External Affairs, Deputy Commissioner for Finance and Management, Deputy Commissioner for Law and Policy, Deputy Commissioner for Operations, and Chief Information Officer

Performance Measures and Targets

Fiscal Year Targets	FY 2025 Estimate	FY 2026 Estimate
Improve the integrity of the Supplemental Security Income Program by focusing our efforts on reducing overpayments	94.00% (O/P)[3]	94.00% (O/P)
Maintain a high payment accuracy rate by reducing overpayments in the Old-Age, Survivors, and Disability Insurance Program	99.80% (O/P)	99.80% (O/P)
Ensure the quality of our decisions by achieving the State disability determination services decisional accuracy rate for initial disability decisions	97% decisional accuracy	97% decisional accuracy
Identify and eliminate non-critical contracts and grants	Achieve a cost avoidance of $180 million	Achieve a cost avoidance of $90 million
Reduce our real property footprint	Achieve a 250,000 USF reduction	TBD

What Do We Plan to Accomplish in FYs 2025 and 2026?

Expand Program and Payment Integrity Efforts: Dedicated program integrity funding helps ensure individuals receive the benefits to which they are entitled and helps safeguard the integrity of benefit programs by confirming eligibility, preventing fraud, and improving payment accuracy. We will continue our effective program integrity work, including medical and work continuing disability reviews (CDR) and SSI non-medical redeterminations. By the end of FY 2026, we plan to process approximately 219,000 more medical CDRs than we processed in FY 2024. Our program integrity work helps ensure individuals receive the benefits to which they are entitled and safeguards the integrity of benefit programs to better serve recipients by confirming eligibility, improving payment accuracy for both overpayments and underpayments, and preventing fraud.

[3] This represents a 3.5 percentage point increase relative to the FY 2023 actuals. The FY 2023 overpayment accuracy rate is 90.82 percent. FY 2024 results will be available in summer 2025.

Addressing Root Causes of Improper Payments: We are implementing new procedures to protect our customers and strengthen program integrity. We are implementing a payroll information exchange (PIE) to automate the timely receipt of wages so we can make more accurate benefit payments, which reduces improper payments. PIE reduces the public's burden to report wages and manual work for our employees who process reported wages. We are implementing PIE through a phased rollout approach through September 2025 and raising public awareness of PIE.

Enhance Fraud Prevention and Detection Activities: We are improving our use of data analytics, predictive modeling, and enhanced technology to detect irregularities and prevent fraud before issuing payments. We will implement enhanced fraud-prevention tools for claims filed and post-entitlement transactions initiated over the phone. This technology will include anti-fraud capabilities that will detect anomalies within a person's account, protecting beneficiaries. Additionally, we plan to migrate our remaining eServices fraud detection analytics to the Anti-Fraud Product Line (AFPL). The AFPL is a modernized, enterprise-supported product line that brings our anti-fraud program into the future by enabling it to improve customer service, reduce the impact of fraud on frontline operations, and support our modernization efforts. We plan to release the first iteration of a new Fraud Risk Inventory Tool to replace current, manual processes and add in more advanced capabilities, such as web-based application, visual analytics, and AI technology where possible. In alignment with the Presidential memorandum, *Preventing Illegal Aliens from Obtaining Social Security Act Benefits*, we will expand our full-time fraud prosecutor program by increasing the number of Special Assistant United States Attorneys working to prosecute bad actors.

Promote Efficiency and Reduce Costs in Procurement: We will enhance the efficiency of our procurement process by reducing the costs associated with the acquisition of goods and services. We will work with the General Services Administration to consolidate procurement of common goods and services to eliminate waste and duplication. We will also terminate non-essential contracts and grants while identifying reductions in other IT contracts to reduce unnecessary spending.

Reduce Our Real Property Footprint: We will continually assess the long-term future of agency facilities and optimize our real property portfolio in alignment with the Administration's goal to efficiently utilize space. As we consolidate operations based on business and customer needs, we are accelerating the disposition of underutilized and inefficient buildings and maximizing the use of space currently occupied. We are committed to preserving access to our field offices.

Implement the Social Security Fairness Act (SSFA): The SSFA ended the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO). These provisions had reduced or eliminated Social Security benefits for over 2.8 million people who receive a pension based on work that was not covered by Social Security because they did not pay Social Security taxes. We are paying retroactive benefits and increasing monthly benefit payments to eligible beneficiaries affected by WEP and GPO. People who will benefit from the new law include teachers, firefighters, police officers, some public workers and some with work covered by a foreign social security system. We are fully implementing the new statute, ensuring all manual payment adjustments for SSFA are complete by December 2025.

Optimize and Empower the Workforce

To deliver core mission services as our customer base grows, we are realigning our workforce to shift employees into direct-service positions. The changes ensure we are optimizing the indirect support our frontline workers need, supporting the integrity work needed to protect taxpayer dollars, and fulfilling other statutorily directed functions.

Leads: Deputy Commissioner for Disability Adjudication, Deputy Commissioner for Human Resources, and Deputy Commissioner for Operations

Performance Measures and Targets

Fiscal Year Targets	FY 2025 Estimate	FY 2026 Estimate
Optimize our workforce	Increase full-time permanent employees in direct-service components[4] to 88% of total staff	Maintain 88% of full-time permanent employees in direct-service components

What Do We Plan to Accomplish in FYs 2025 and 2026?

Implement Workforce Realignment for Mission-Critical Positions: To align with the Administration's priorities, we are right sizing our workforce and renewing our focus on core mission responsibilities. Specifically, we are:

- transitioning employees from mission-support roles in our headquarters and regional offices to mission-critical positions that directly serve the public in alignment with our plan to enhance service delivery and operational efficiency;
- consolidating our support functions performed by headquarters and regional staff, while transitioning highly qualified professionals to frontline service delivery positions;
- monitoring our staffing levels and planning to move forward with mission-critical hiring in accordance with current executive orders; and
- preparing our workforce to provide timely and quality service to the public.

Enhance Training Quality and Technological Solutions to Better Equip Our Workforce: It is imperative that our frontline employees are properly trained to carry out our important mission. We are focused on providing our employees with technical training and better electronic tools to assist them with serving our customers more effectively and efficiently. We will increasingly leverage just-in-time training to increase employees' skills and competence, allowing them to address tasks on demand. We will improve productivity by identifying the most error-prone workloads and creating cohorts with special training to handle those workloads nationally.

[4] Federal mission critical positions provide direct services to the public, including but not limited to employees in field offices, teleservice centers, processing centers, hearing offices, and other centralized operations or disability workload support units.

Budgeted Workload Measures

Workload and Outcome Measures	FY 2025 Enacted[5]	FY 2026 Request	FY25 to FY26 Changes	FY 2026 Planned Achievements
Retirement and Survivor Claims (includes Medicare)				
Retirement and Survivor Claims Completed (thousands)	6,880	6,886	< 0.1%	Increasing retirement claims processing
Disability Claims				
Initial Disability Claims Receipts (thousands)	2,209	2,307	+ 4.4%	Reducing disability claims pending and average processing time, despite increasing receipts.
Initial Disability Claims Completed (thousands)	2,349	2,322	- 1.2%	
Initial Disability Claims Pending (thousands)	1,015	1,000	- 1.5%	
Average Processing Time for Initial Disability Claims (days)[6]	225	220	- 2.2%	
Disability Reconsiderations				
Disability Reconsiderations Receipts (thousands)	634	627	- 1.1%	Increasing reconsiderations completed by over 13% and reducing pending.
Disability Reconsiderations Completed (thousands)	570	649	+ 13.9%	
Disability Reconsiderations Pending (thousands)	394	372	- 5.6%	
Average Processing Time for Disability Reconsiderations (days)	248	248	< 0.1%	
Hearings				
Hearings Receipts (thousands)	400	478	+ 19.5%	Increasing hearings completions and reducing average processing time by 10 days.
Hearings Completed (thousands)	390	403	+ 3.3%	
Hearings Pending (thousands)	272	347	+ 27.6%	
Annual Average Processing Time for Hearings Decisions (days)	280	270	- 3.6%	
National 800 Number				
National 800 Number Calls Handled (millions)[7]	35	35	< 0.1%	Reducing the average speed of answer by over 30%.
Average Speed of Answer (ASA) (minutes)[8]	18	12	- 33.3%	
Agent Busy Rate (percent)	9.0%	10.0%	+ 11.1%	
Program Integrity				
Periodic Continuing Disability Reviews (CDR) Completed (thousands)	1,200	1,400	+ 16.7%	Increasing medical continuing disability reviews by 50%.
Full Medical CDRs (included above, thousands)	400	600	+ 50.0%	
SSI Non-Medical Redeterminations Completed (thousands)	2,482	2,600	+ 4.8%	
Selected Other Agency Workload Measures				
Social Security Numbers (SSN) Completed (millions)	18	18	< 0.1%	Delivering essential social security number and earnings record updates.
Annual Earnings Items Completed (millions)	300	305	+ 1.7%	
Social Security Statements Issued (millions)[9]	11	15	+ 36.4%	
Selected Production Workload Measures				
Disability Determination Services Production per Workyear[10]	267	288	+ 7.9%	Increasing productivity through efficiencies.
Office of Hearings Operations Production per Workyear	83	87	+ 4.8%	

[5] FY 2025 data is as of May 2025 and does not incorporate reassignments of support staff to mission-critical jobs.

[6] Average processing time for initial disability claims is an annual figure. In the fourth quarter of FY 2026, we estimate reducing the wait time for initial disability decisions to 190 days.

[7] Includes calls handled by automation. For FY 2025 and FY 2026, we project about 4 million automated calls handled in each year.

[8] We are currently developing an alternative performance measure to supplement ASA.

[9] The Social Security Statements Issued measure includes paper Statements only. It does not include electronic statements issued. In FY 2024, *my* Social Security users accessed their Social Security Statements 40 million times. Consistent with FYs 2024 and 2025, in FY 2026, we will send paper Statements to people aged 60 and older who are not receiving Social Security benefits and who are not registered for *my* Social Security account, at a cost of approximately $12 million.

[10] DDS Production Per Workyear (PPWY) includes cases completed via Federal assistance.

Appendix

Key Management Officials' Responsibilities

Commissioner of Social Security (COSS) provides executive leadership to SSA and exercises general supervision over major components of the agency.

Chief of Staff (CoS) manages the day-to-day operations of the Commissioner's Office and serves as a trusted advisor.

Chief Operating Officer (COO) responsible for implementation of operational strategies to improve organizational efficiency, productivity, and sustainability.

Chief Actuary (OCACT) plans and directs program actuarial estimates and analyses for our programs and for any proposed changes in programs and trust funds. OCACT provides technical and consultative services to the COSS, the Trustees of the Social Security Trust Funds, Congress, and their staffs.

Inspector General (IG) is a Senate-confirmed position that promotes economy, efficiency, and effectiveness in administering our programs and operations, and prevents and detects fraud, waste, abuse, and mismanagement.

Deputy Commissioner for Disability Adjudication (DCDA) oversees our disability program in accordance with relevant Federal laws, providing support to State disability determination services. DCDA also oversees Federal disability processing units and disability processing branches, as well as the quality review program.

Deputy Commissioner for External Affairs (DCEA) conducts our national public outreach programs and fosters the transparency of our operations. DCEA also develops and oversees our communication program, serves as our liaison to Congress, and analyzes legislative and regulatory initiatives.

Deputy Commissioner for Finance and Management (DCFM) directs our comprehensive management programs including budget, financial policy and program integrity, acquisition and grants, and facilities and security management. DCFM also coordinates the agency's anti-fraud initiatives and serves as the accountable official for improper payments.

Deputy Commissioner for Human Resources (DCHR) administers our human resources programs, including required training and human capital initiatives.

Deputy Commissioner for Law and Policy (DCLP) advises the COSS, DCOSS, and all subordinate organizational components (except the Inspector General) on legal matters. DCLP serves as the agency's Senior Agency Official for Privacy, and oversees policy development, analysis, and implementation. DCLP is also responsible for research, evaluation, and statistical programs.

Deputy Commissioner for Operations (DCO) oversees our direct service network of field offices, National 800 Number teleservice centers, processing centers, and workload support units.

Chief Information Officer (CIO) directs the management of our systems and databases, which includes the development, validation, and implementation of new systems. The CIO aligns information technology initiatives with overall business goals to drive innovation. The CIO also provides enterprise-wide oversight of data-sharing agreements and negotiates Social Security (totalization) agreements with foreign governments.

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