



# OVERVIEW OF OUR FISCAL YEAR 2024 GOALS AND RESULTS

## How We Manage Performance

**Performance Framework:** The *Government Performance and Results Modernization Act of 2010* (GPRMA) describes how agency strategic plans and goals align with presidential terms and broader Federal efforts.

Setting goals and measuring our performance are vital to our success. We define our performance framework in the [Fiscal Years \(FY\) 2022–2026 Agency Strategic Plan \(ASP\)](#). Our ASP defines our strategic goals and details underlying strategic objectives, strategies, and relevant risks and mitigation plans.

Our Strategic Goals are:

- Strategic Goal 1: Optimize the Experience of SSA Customers;
- Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce; and
- Strategic Goal 3: Ensure Stewardship of SSA Programs.

**Planned Performance:** In March 2024, we published our [Annual Performance Plan \(APP\) for FY 2025, Revised Performance Plan for FY 2024, and Annual Performance Report \(APR\) for FY 2023](#) as part of the [President's FY 2025 Budget Request](#). We refer to this consolidated plan and report as the APR. The APR outlines our tactical plans for achieving the Strategic Goals and Objectives in our ASP, finalizes our FY 2024 performance commitments, and describes how we ensure data integrity of our performance information. The budgeted workloads published in our APR correspond to the key workload measures in the [FY 2024 Operating Plan](#).

**Actual Performance and Program Results:** We update the APR after the close of the fiscal year to provide performance results for the previous fiscal year. We plan to publish the final APR containing our actual FY 2024 results in January 2025. The final FY 2024 APR and FYs 2025–2026 APP will be published separately and available on our [website](#).

This *Agency Financial Report* summarizes our strategic initiatives, overall performance results, and financial activities we conducted to carry out our mission in FY 2024. The following table shows our operating expenses by Strategic Goal and Objective.



### FY 2024 Operating Expenses by Strategic Goal and Strategic Objective (Dollars in Millions)

<b>Strategic Goal 1: Optimize the Experience of SSA Customers</b>	<b>\$12,155</b>
Strategic Objective 1.1: Identify and Address Barriers to Accessing Services	\$1,440
Strategic Objective 1.2: Expand Digital Services	\$1,876
Strategic Objective 1.3: Build a Customer-Focused Organization	\$8,839
<b>Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce</b>	<b>\$707</b>
Strategic Objective 2.1: Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement	\$280
Strategic Objective 2.2: Support Employees' Chosen Career Paths	\$427
<b>Strategic Goal 3: Ensure Stewardship of SSA Programs</b>	<b>\$2,620</b>
Strategic Objective 3.1: Improve the Accuracy and Administration of Our Programs	\$1,875
Strategic Objective 3.2: Identify and Eliminate Potential Barriers to Access Contracts and Grants	\$22
Strategic Objective 3.3: Improve Organizational Performance and Policy Implementation	\$723

**Priorities:** In support of the GPRMA, we established three Agency Priority Goals (APG), which are 24-month goals reflecting our top priorities. We routinely review our progress and take actions to improve our outcomes, promote innovation, and deliver favorable results.

For FYs 2024–2025, our APGs are:

1. Improve Initial Disability Claims.
2. Improve the National 800 Number Service.
3. Improve Equity in the Supplemental Security Income Program.

These near-term goals improve outcomes, setting the stage for improved customer experience and efficiency. They also serve as stepping stones towards long-term objectives outlined in our ASP. We set ambitious targets to improve service for each of these APGs. We are adjusting procedures, policies, and maximizing the resources we have, to improve services.

**Improve Initial Disability Claims:** It is unacceptable for individuals to wait over 200 days to receive an initial disability determination. Our priorities for this APG are to mitigate further increases in average processing time for initial claims and to decide the most aged pending claims. In FY 2024, we processed over 255,000 more initial disability claims than we did in FY 2023. By September 27, 2024, our average processing time for initial disability claims was 231 days. In addition, we decided about 95 percent of our cases that started FY 2024 pending 180 days or more, exceeding our target by 3 percent.

**Improve the National 800 Number Service:** We are implementing technology that benefits both our customers and employees. Between November 2023 and May 2024, we instituted a series of changes to reduce the average speed of answer, including re-routing calls to other available agents and offering a Call Back Assist option to callers, allowing customers the option of receiving a call when agents are available instead of waiting to speak with an agent. In August 2024, we transitioned our 800 number phone system to Amazon Web Services (AWS)/Amazon Connect, which increases queue size, improves management and scheduling information, offers callers enhanced callback and self-service options, and post-call satisfaction surveys. The



transition to the new system improves our customers' ability to speak with available National 800 Number agents. In FY 2024, we reduced our average speed of answer by 8.2 minutes, down to 27.6 minutes from 35.8 minutes at the end of FY 2023. The transition to AWS sets us on the path to improved delivery.

**Improve Equity in the Supplemental Security Income Program:** We take seriously our responsibilities to ensure eligible individuals timely receive the correct benefits to which they are entitled, and to safeguard the integrity of our benefit programs. Although our underpayment (UP) accuracy rates are high, we focused our attention on releasing SSI UPs pending for a year or more as of October 1, 2023 or identified as priority cases, so people can receive the money they are due. We made notable progress towards improving equity in the SSI program by increasing UP processing of our oldest and highest priority cases, including those disproportionately impacted by poverty. By September 30, 2024, we cleared about 65 percent of nearly 152,500 SSI UPs that were identified as priority cases, which is more than halfway to our goal to complete 98 percent of these cases by the end FY 2025. We also processed over 534,000 total SSI UPs.

Please visit [Performance.gov](https://www.performance.gov) for more information on our APG goals, progress, results, and how we focus leadership priorities to drive progress and change.



### **Remember! You Can Access Our Services Online**

Our [online services](#) allow you to request a replacement Social Security card (in most States), print a benefit verification letter, and more—from anywhere and from any of your devices!



## Summary of Fiscal Year 2024 Performance

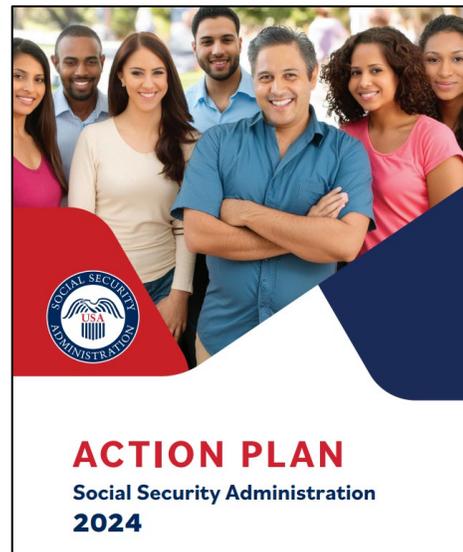
This section provides a high level overview of progress made in accomplishing the strategic objectives and our FY 2024 agency-driven performance measures and targets established in our published [FYs 2023–2025 Annual Performance Plan and Report](#). We highlight the approaches we used to achieve our FY 2024 performance measure results, outline some of the challenges we faced meeting these goals and provide an analysis of our performance.

Our budget directly drives the level of service we can deliver, including systems improvements and staffing to stay current with our workloads. While we face multiple challenges to restore service delivery to the standards both we and the public expect, we are working diligently to do so within our resource levels.

For FY 2024, we used 17 performance measures to track progress toward meeting our strategic goals and strategic objectives. Overall, we met our targets for 11 of the 13 performance measures with available data. Final data for 4 of the remaining performance measure targets were not available at the time we published this report. The unavailable data results are indicated as to be determined (TBD).

For more information on our FY 2024 performance, please see our FY 2024 APR, which we expect to publish in January 2025.

In FY 2024, we also published the [2024 SSA Action Plan](#) that details the actions we are taking to address our top priority areas across the agency. The Action Plan was the product of over 5,000 recommendations offered by employees from the frontlines to our regional offices, as well as from a range of other internal and external stakeholders. It contains 27 initiatives accompanied by leading actions and quick wins, a number of which have been accomplished, including a number of actions within the [first 100 days of the Commissioner's term](#).





## Strategic Goal 1: Optimize the Experience of SSA Customers

### Strategic Objectives

- 1.1 Identify and Address Barriers to Accessing Services
- 1.2 Expand Digital Services
- 1.3 Build a Customer-Focused Organization



Create a *my* Social Security account

[SSA.gov/myaccount](https://www.ssa.gov/myaccount)

Our goal is to optimize the experience of our customers by providing timely, accurate, and efficient access to our services, while improving the public's experience with our services and programs. We are designing and delivering services that reflect the perspective of the people we serve. We are adopting modern ways to operate and re-engineering policy and business models to improve the customer experience. What follows, highlights our progress and challenges toward accomplishing our Strategic Goal and Objectives.

### Strategic Objective 1.1: Identify and Address Barriers to Accessing Services

Advancing equity in service delivery, involves removing unnecessary administrative burdens. We expanded our network of advocates and community-based organizations to help us address the needs of people facing barriers to accessing our services. This includes ensuring access to quality services and program benefits, regardless of an individual's ability to communicate in English. We are also increasing data collection strategies to better understand customers seeking our services. Additionally, we updated our [Equity Action Plan \(2023 Update\)](#) to ensure we prioritize administering our programs equitably for underserved people.

In FY 2024, we issued several final rules that simplified our processes for people who are applying for and receiving SSI. These changes streamlined our rules, making them less cumbersome to administer and easier for the public to understand and follow. On March 27, 2024, we published a final rule to remove food from In-Kind Support and Maintenance calculations in determining SSI benefits. This new rule improves the equitable treatment of food assistance within the SSI program. On April 17, 2024, we published a final rule, "Expansion of the Rental Subsidy Policy for SSI Applicants and Recipients." Under the rule, rental assistance, such as renting at a discounted rate, is less likely to affect a person's SSI eligibility or payment amount. This new rule extends the same policy to all SSI applicants and recipients nationwide. On April 19, 2024, we published a final rule, "Expand the Definition of a Public Assistance Household." This new rule broadens the definition of a public assistance household to include households receiving Supplemental Nutrition Assistance Program payments and households where only some members receive public assistance. These three new



final rules took effect on September 30, 2024, and allow more people to qualify for SSI, increase some SSI recipients’ payment amounts, and reduce reporting burdens for individuals living in public assistance households.

We also released our first global [Language Access Plan](#) that included our Limited English Proficiency (LEP) policy and *Language Access Implementation Plan*. Our *Language Access Plan* takes reasonable steps to ensure access to our benefits, services, and information for individuals with LEP and who are deaf or hard of hearing. This plan includes guidance on activities such as bilingual recruitment efforts, multi-language notices, and improved procurement of translation services.

We improved our race and ethnicity data collection, which will allow us to better identify and fix potential disparities in service. In FY 2024, we completed contract negotiations with seven States to include race and ethnicity data through our Enumeration at Birth program.

In FY 2024, as a [High Impact Service Provider](#), we established baseline customer experience (CX) scores for our three priority service designations based on customer trust. We established a 75.2 percent CX score for applying for Social Security adult disability benefits, 91.5 percent CX score for applying for Social Security retirement benefits, and 93.7 percent for applying for a replacement Social Security Number (SSN) card.

**Performance Measure 1.1b: Collect Customer Feedback<sup>1</sup>**

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Not available	Not available	Not available	Did not meet our target to establish end of journey feedback collection for priority service designations	Establish baseline customer experience scores for priority service designations	Established baseline customer experience scores for priority service designations based on customer trust as prioritized in OMB Circular A-11

Note:

1. Customers have the opportunity to provide feedback and their perspective after a series of interactions or completion of a multi-stage process. We ask questions about overall customer satisfaction and trust. In addition, we ask questions around different customer experience drivers such as accomplishment rate, customer effort, efficiency, equity, and employee interaction.



We integrated CX management disciplines throughout the agency. This includes customer research and measurement, which involves scoring individual customer experiences and understanding various customer “pain points” throughout their journey in applying for benefits. Based on customer feedback, we developed solutions to address these pain points. For example, customers sometimes do not show up to their initial appointment to apply for benefits. To address this challenge, we are conducting a pilot program where we send standard appointment reminders to applicants via text or email with the option to confirm, reschedule, or cancel their appointment.



## Strategic Objective 1.2: Expand Digital Services

We are committed to making our services more convenient and efficient. [my Social Security](#), our personalized, self-service alternative to telephone and in-person services, gives our customers access to a growing suite of services using their mobile device or computer. In FY 2024, we expanded the use of video appointments, allowing technicians to process the same work over video traditionally completed by telephone. We also made improvements to the online Non-Medical Appeal application, iAppeals. This application allows people to request an appeal if they disagree with a non-disability decision, such as income or overpayments (OP). We also redesigned the disability content on SSA.gov in both English and Spanish, making it easier for the public to read and understand. We provided more precise instructions on how to file for disability benefits via self-service options and set better expectations about wait times.

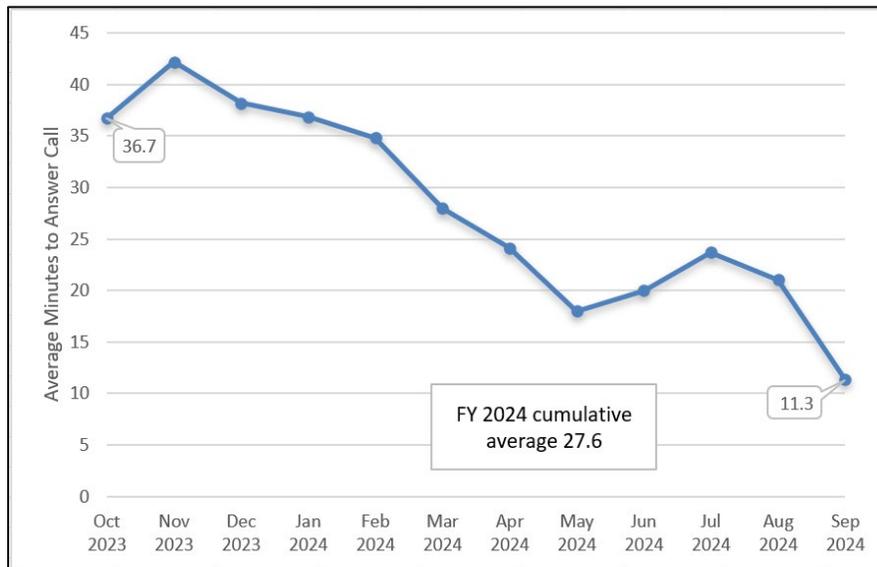
Last fiscal year, we began the rollout of our digital self-service option, *Upload Documents*, to allow individuals applying for or receiving certain services to upload forms, documents, or evidence associated with their transactions. In FY 2024, we completed a nationwide expansion to all field offices and workload support units. Customers can now use *Upload Documents* to submit 50 agency forms and 79 evidence types for electronic signature and submission. We connected *Upload Documents* to [my Social Security](#), providing customers an additional way to access uploading forms and evidence. We also added text messaging as an additional option to receive notifications and link to upload forms and evidence and made it easier for customers to create accounts while still maintaining privacy and security. We completed risk assessments on 57 forms to consider signature requirement removal and removed the signature from 12 forms. We also worked to remove the signature requirement from an additional 31 forms.

We expanded our Enterprise Scheduling System to offer enumeration self-scheduling to customers in all 50 States, the District of Columbia, and 5 U.S. territories. This web-based appointment system allows customers, including those without an SSN, to self-schedule appointments online for both original and replacement SSN cards. We also added 12 States to the list of those that now allow applicants to conveniently apply online for a replacement SSN





### National 800 Number Monthly Average Speed to Answer for FY 2024



In FY 2024, we implemented a new, modern phone system which has resulted in reduced customer wait times. It also eliminated busy signals, provides estimated hold times, and gives customers the option to request a call back from an available agent instead of waiting on the line. Our transition to the AWS platform provides stable, reliable, and accessible phone service to the public. These changes have reduced the average monthly wait time from a peak of 42.2 minutes in November 2023 to 11.3 minutes by September 2024. In FY 2024 overall, we reduced our average speed of answer by 8.2 minutes, down from 35.8 minutes at the end of FY 2023 to a cumulative average speed of answer of 27.6 minutes by the end of the year.

Reducing the wait time for an applicant to receive a disability decision is a top priority. Since FY 2019, the number of people waiting for an initial disability decision has doubled from around 590,000 to 1.2 million people. The average wait time for a disability decision is nearly eight months and an additional eight months for those requesting an appeal of the initial decision. Our State DDSs struggle to maintain adequate staffing. We are making changes to reduce wait times and provide a more efficient, compassionate experience for our claimants. This includes increasing receipt of electronic medical evidence, as well as increasing our employees' use of Intelligent Medical Language Analysis Generation, which analyzes text from health records and expedites processing times for disability claims. We have also increased the submission of electronic medical evidence via our automated Health Information Technology (HIT) program, Electronic Records Express (ERE) web portal, and web services. Over the last five years, we have increased the volume of medical evidence collected electronically.



**Performance Measure 1.3b:  
Modernize Evidence Acquisition Systems to Drive Increased  
Electronic Medical Evidence Volumes Through a Multi-Channel Strategy**

<b>FY 2020 Results</b>	<b>FY 2021 Results</b>	<b>FY 2022 Results</b>	<b>FY 2023 Results</b>	<b>FY 2024 Target</b>	<b>FY 2024 Results</b>
Acquired 52% of electronic medical evidence	Acquired 53% of electronic medical evidence	Acquired 55% of electronic medical evidence	Acquired 55% of electronic medical evidence	Acquire 57% of electronic medical evidence <sup>1</sup>	Acquired 58% of electronic medical evidence

Note:

1. The target represents the percentage of medical records received electronically through ERE, ERE Web Services, Bulk Transfer, and HIT.

In FY 2024, we reduced the initial disability claims development requirement for past relevant work from 15 years to 5 years. This rule change will reduce the burden on claimants and staff while still providing enough information to make accurate decisions. We also restored a pre-2018 policy, called collateral estoppel, that allows technicians in local field offices to apply a prior determination of disability, in certain circumstances. This change eliminates the need for some beneficiaries to provide updated medical documentation for subsequent claims, eliminating between 45,000–60,000 claims annually that require DDS determinations. We also made historic progress by reducing the hearings backlog. For the first time in three decades, we have fewer than 275,000 pending hearings before our Administrative Law Judges.



The following table summarizes our FY 2024 performance measures target and results that support our Strategic Goal and Objectives:

**Strategic Goal 1: Optimize the Experience of SSA Customers  
Performance at a Glance**

Strategic Objective	Performance Measure	FY 2024 Target	FY 2024 Results (Actuals)	Performance Status
<b>1.1: Identify and Address Barriers to Accessing Services</b>	1.1a: Redesign SSA's website to enhance the user's online experience	Achieve a 1% increase in satisfaction for customers using SSA's website over FY 2023 results (target Customer Satisfaction Score of 71.0)	Exceeded our goal by increasing our customer satisfaction score for using SSA's website to 80.7 percent, which was a 9.7 percent increase over our FY 2023 score (71.0 percent)	<b>Met</b>
	1.1b: Collect customer feedback	Establish baseline customer experience scores for priority service designations	Established baseline customer experience scores for each of our priority service designations based on customer trust as prioritized in OMB Circular A-11, Part 6, Section 280	<b>Met</b>
	<b>1.2: Expand Digital Services</b>	1.2a: Increase the number of successfully completed online transactions	Increase the number of successfully completed online transactions by 5 million over the prior year (406 million)	Successfully completed 441 million online transactions, exceeding our FY 2024 target of 406 million online transactions, which was about 39.6 million more transactions than FY 2023
<b>1.3: Build a Customer-Focused Organization</b>	1.3a: Provide uninterrupted access to our systems during scheduled times of operations	99.90% availability	Systems availability was 99.83%, which did not meet our target of 99.90%; experienced two major disruptions to our systems availability in the 4th quarter of FY 2024	<b>Not Met</b>
	1.3b: Modernize evidence acquisition systems to drive increased electronic medical evidence volumes through a multi-channel strategy	Acquire 57% of electronic medical evidence	Final percentage of electronic medical evidence acquired for FY 2024 was 58 percent, exceeding the goal of 57 percent	<b>Met</b>
	1.3c: Improve customer service by reducing the number of actions pending at the processing centers	5.05 million	Actions pending at the processing centers was 5.13 million by the end of FY 2024, which is above our target of 5.05 million; processing centers received more actions than anticipated	<b>Not Met</b>



## Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce

### Strategic Objectives

- 2.1 Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement
- 2.2 Support Employees' Chosen Career Paths



Our goal is to ensure our hiring and promotion practices promote equity, as we work to ensure our workforce delivers customer-focused service to diverse populations and reflects the diversity of the customers we serve. We strive to foster an environment that allows them to develop and succeed. We align our human capital policies and emerging technologies, to attract, train, develop, and retain our workforce. What follows are highlights of our progress and challenges toward accomplishing our Strategic Goal and Objectives.

### **Strategic Objective 2.1: Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement**

Our employees are the heart of the agency. We believe a well-trained, dedicated workforce that reflects the diversity of our customers, is essential to accomplishing our mission. We improved our recruitment and retention practices to build and maintain a representative workforce, including identifying and fostering talent through strategic partnerships with colleges and universities. For example, we enhanced our digital recruitment efforts by leveraging various online platforms to connect with candidates from universities, including Hispanic Serving Institutions, Historically Black Colleges and Universities (HBCU), Minority Serving Institutions, and military installations. Through these platforms, we have reached over 1,500 colleges and universities. We also announced job vacancies using various methods, including increasing the use of social media platforms for recruiting and improving accessibility for employees with disabilities; enhancing data collection and analysis of reasonable accommodation (RA) requests to inform agency RA policies; and increasing function, evaluation, and compliance of [Section 501 of the Rehabilitation Act of 1973](#), which prohibits discrimination against people with disabilities in Federal Government employment, and the [Architectural Barriers Act Accessibility Standards](#). To ensure all employees have equal opportunities to advance in their careers, we conducted a barrier analysis of our workforce to identify barriers to equal employment opportunity (EEO). We also conducted an analysis of the agency's performance management system to ensure equity in this process. To promote a respectful, safe, and inclusive workplace, we launched the Civil Rights and Diversity Empowerment Portal, a consolidated equal opportunity training site for non-managers, managers, and EEO practitioners.



## Strategic Objective 2.2: Support Employees' Chosen Career Paths

We are committed to retaining newly hired employees and increasing employee retention by providing them with necessary training and assistance to successfully manage their workloads. According to our exit survey data, the top three reasons people are leaving are because of morale, training and development, and burn out from managing heavy workloads. While morale and workload issues are ongoing challenges, we revamped entry-level training for our frontline positions. For example, we transformed training for employees in field offices and workload support units by implementing a new training framework. As part of this new framework, trainees work onsite for up to three months, managers cluster trainees in small groups to build community and peer-to-peer support, and trainees have a dedicated mentor throughout the training process. Mentors focus on supporting their trainees and assisting them with learning the complex workloads they will experience on the job. For our teleservice centers, we redesigned training to make new content available via an online platform with onsite facilitator support.

Employees who are well-trained and equipped with the proper tools are critical to our success in providing quality service to the public. We encourage our employees to pursue their chosen career paths by fostering an engaging workplace environment and providing training and development opportunities. We focused on improving employee engagement, strengthening our performance management process, and ensuring equity in leadership development. In FY 2024, we launched the *Invest in You!* Website, giving employees access to information about employee wellness, career and professional development, management support, and chosen career paths.

Developing our employees begins with leadership. We invested in ongoing training and development opportunities for managers. Providing managers with the foundational tools to perform their responsibilities positions them to effectively train and manage the performance of their staff, improve employee engagement, increase productivity, and improve retention. In FY 2024, we offered refresher training on hiring authority to all managers to ensure they effectively use all available hiring authorities. We also launched the Leadership Fundamentals (LF) Year 3–5 curriculum with an enrollment of over 800 supervisors. The curriculum builds upon LF Year 1–2, offering about 30 courses that cover leading people, human capital management, and problem-solving. We ensured our managers are trained in a timely manner.

### Performance Measure 2.2b: Ensure New Supervisors Receive Timely Leadership Training

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
100% of supervisors enrolled within 90 days and 98% completed training within one year	100% of supervisors enrolled within 90 days and 54% completed training within one year	82.4% of new supervisors complete training within one year of the effective date of their supervisory appointment	96% of new supervisors completed training within one year of the effective date of their supervisory appointment	At least 95% of new supervisors complete training within one year of the effective date of their supervisory appointment <sup>1</sup>	96% of new supervisors completed training within one year of the effective date of their supervisory appointment

Note:

1. The target represents the percentage of new supervisors that complete training within one year of the effective date of their supervisory appointment.



The following table summarizes our FY 2024 performance measures target and results that support our Strategic Goal and Objectives:

**Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce Performance at a Glance**

Strategic Objective	Performance Measure	FY 2024 Target	FY 2024 Results (Actuals)	Performance Status
2.1: Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement	2.1a: Increase the use of workforce data analyses to support executive workforce and succession planning and data-driven decision making	Release four new workforce planning and analysis resources	Released five workforce planning and analysis resources	● Met
	2.2a: Improve employee engagement	Achieve a score of 75 on the Employee Engagement Index (Supervisor subindex)	Achieved a score of 77 on the Employee Engagement Index (Supervisor subindex), exceeding our target	● Met
2.2: Support Employees' Chosen Career Paths	2.2b: Ensure new supervisors receive timely training to improve their leadership skills and competencies	At least 95% of new supervisors complete training within one year of the effective date of their supervisory appointment	96 percent (474 of 494) of supervisors appointed in FY 2023 completed training within one year, which exceeded our target	● Met
	2.2c: Strengthen manager accountability for effective performance management	Track 96% of performance documents through e7B	Tracked 96 percent of performance documents through e7B	● Met

## Help secure today and tomorrow...

SSA Careers

Securing today and tomorrow

Chances are, you either receive Social Security benefits or know someone who does. We provide financial protection for nearly 64 million individuals and families, including veterans, the chronically ill, widows and widowers, the children of deceased parents, retirees, and people with disabilities. We are there throughout life's journey, helping secure today and tomorrow.

Join us today and make a difference in the lives of millions.



## Strategic Goal 3: Ensure Stewardship of SSA Programs

### Strategic Objectives

- 3.1 Improve the Accuracy and Administration of Our Programs
- 3.2 Identify and Eliminate Potential Barriers to Access Contracts and Grants
- 3.3 Improve Organizational Performance and Policy Implementation



### Antifraud facts

Our goal is to ensure stewardship and the efficient administration of our programs and to look for ways to identify and address potential inequities. We focused our efforts on three major areas: improving program integrity, enhancing our fraud prevention and detection activities, and improving workforce performance and increasing accountability. What follows are highlights of our progress and challenges toward accomplishing our Strategic Goal and Objectives.

### **Strategic Objective 3.1: Improve the Accuracy and Administration of Our Programs**

We strive to pay our customers the correct benefit amount on-time and reduce improper payments (IP). We pursue opportunities to improve payment accuracy and prevent IPs through enhanced technology, data analyses, and fraud prevention. We are committed to improving the integrity of our programs by reducing OPs and UPs through streamlining our policies and procedures, automating our business processes, and leveraging data through exchanges with other entities. Our most recent accuracy report for OASDI shows that OP accuracy was 99.76 percent, and OASDI UP accuracy was 99.94 percent. For SSI, our most recent accuracy report shows that OP accuracy was 90.82 percent and UP accuracy was 98.56 percent.

Office of Management and Budget (OMB) Circular A-123, Appendix C, *Requirements for Payment Integrity Improvement*, defines “High-Priority” programs as all programs with IPs resulting in monetary loss that exceed \$100,000,000 annually. Our OASDI and SSI programs meet the definition of High-Priority programs. See the Payment Integrity section of this report or [PaymentAccuracy.gov](https://www.ssa.gov/pim/) for additional information on our program integrity efforts.

In FY 2024, we made the following policy updates to address OPs:

- Stopped automatically intercepting 100 percent of an overpaid beneficiary’s monthly Social Security benefit if the beneficiary failed to respond to repayment requests. We are



now using a much more reasonable default withholding rate of 10 percent of monthly benefits—the same rate as the SSI program;

- Reframed guidance and procedures to shift the burden of proof away from the claimant in OP “at fault” determinations;
- Increased repayment terms up to 60 months without requesting income and asset information for most beneficiaries who request a repayment plan;
- Made it easier to request a waiver of repayment in “no fault” cases where the OP was caused by agency error and a beneficiary is unable to repay;
- Updated our policies to allow technicians to use the simplified, “administrative waiver” process when a person requests waiver of an OP of up to \$2,000 (previously \$1,000 or less).

We also improved our use of data analytics and predictive modeling to identify evolving patterns of suspicious activities in our workloads, allowing us to detect and prevent fraud before issuing payments. We implemented Fraud SecurityStat sessions where senior executives meet bi-weekly to analyze and prioritize activities that will most effectively address fraud. Part of this work involves developing our risk management strategy and conducting fraud risk assessments and profiles to understand the fraud landscape. We then build on the strategy, assessment, and profile work to develop and refine data analytics and predictive modeling to detect and prevent fraud. We formed an agency-wide workgroup to develop business requirements that identify the service channel associated with allegations of direct deposit fraud. We are aiming to minimize the amount and rate of successful fraudulent benefit payment redirection through direct deposit changes, and by so doing, reduce the rate at which fraudsters attempt such fraud. We also strengthened our digital identity proofing process by updating language on activation code short message service messages.

### **Strategic Objective 3.2: Identify and Eliminate Potential Barriers to Access Contracts and Grants**

We ensured equitable access to contracting and grant opportunities for underrepresented groups and research institutions serving people of color. We targeted outreach to HBCUs and Institutions Serving Students of Color (ISSC) to solicit feedback about our grantmaking process and potential barriers to grant opportunities. We also conducted monthly outreach meetings with small and large businesses to encourage small business participation in upcoming agency procurements, as well as to promote teaming and opportunities for subcontracting.

In FY 2024, the Retirement and Disability Research Consortium (RDRC) awarded six centers with 5-year agreements including HBCUs and ISSC partnerships. We awarded \$5.7 million in supplemental funding to the six grantees including two ISSCs. We expanded the scope of the RDRC annual meeting by returning it to an in-person event, added a poster session where researchers can share their findings with attendees, and increased networking opportunities for junior scholars. We also expanded training and education funding at HBCUs and ISSCs, and revised scoring criteria to broaden the academic and experience factors considered in the selection process.



**Performance Measure 3.2b: Increase Funding for HBCUs and ISSCs**

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
\$62,686	\$550,577	\$608,896	100% above the 4-year dollar average (\$735,000)	100% above the 4-year dollar average <sup>1</sup>	100% above the 4-year dollar average (\$5,700,000)

Note:

1. These targets represent goals for funding HBCUs and other ISSCs and scholars through the Retirement and Disability Research Consortium.

**Strategic Objective 3.3: Improve Organizational Performance and Policy Implementation**

We explore ways to do business better and apply sound management principles to everyday operations. In FY 2024, we leveraged data, analyses, and program expertise to manage our organizational challenges and deliver on our core mission functions. In accordance with OMB Memorandum [M-23-15, \*Measuring, Monitoring, and Improving Organizational Health and Organizational Performance in the Context of Evolving Agency Work Environments\*](#), we matured our organizational health and performance framework by implementing a new organizational performance management process, called SecurityStat, that both utilizes evidence-based analyses and fosters a culture of continuous improvement. SecurityStat brings top executives and subject matter experts together on a revolving two-week cycle to share information timely, deploy resources quickly, and conduct relentless follow-ups. SecurityStat offers a new and unprecedented level of transparency for our stakeholders. The public can see progress updated every month at [SSA.gov/securitystat](https://ssa.gov/securitystat).



We improved the administration of our programs through simplifying our policies and modernizing our processes. In addition to the final rules that we published to help people receiving and applying for SSI, discussed in [Strategic Objective 1.1](#), in FY 2024, we also improved the Lump Sum Death Payment process by removing many of the questions and evidence requirements for living in the same household determinations—helping surviving spouses or caregivers for children more easily apply for this payment. We also implemented a data exchange agreement to provide State death data to the Department of the Treasury for the Do Not Pay system, in support of *Consolidated Appropriations Act, 2021*.

To ensure we protect taxpayer dollars and practice prudent resource management, every fiscal year, we reassess the long-term future of agency facilities and our real property portfolio. We optimize space utilization while fulfilling workspace needs and in turn, achieve cost savings for the agency. We establish reduction targets as part of our annual *Real Property Capital Plan*, an OMB report that



outlines our plans and strategy for agency real property based on budget and need. In FY 2024, we reduced our real property footprint by over 846,000 useable square feet (USF).

**Performance Measure 3.3a: Reduce Our Real Property Footprint**

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Achieved an 89,406 USF reduction	Achieved a 159,000 USF reduction	Achieved a 43,600 USF reduction	Achieved a 108,614 USF reduction	Achieve an 824,000 USF reduction <sup>1</sup>	Achieved an 846,170 USF reduction

Note:

1. The target represents the actual space occupied. USF does not include common areas of a building such as lobbies, restrooms, stairwells, storage rooms, and shared hallways.



**Scammers Are Pretending to be Government Employees**  
**The Social Security Administration will never threaten, scare, or pressure you to take an immediate action.**

**DO NOT BE FOOLED! IF YOU RECEIVE A SUSPICIOUS CALL:  
 DO NOT give them money or personal information!**

Report the scam at [OIG.SSA.gov](https://oig.ssa.gov).  
 For more information, visit our Antifraud Facts [website](#).



The following table summarizes our FY 2024 performance measures targets and results that support our Strategic Goal and Objectives:

**Strategic Goal 3: Ensure Stewardship of SSA Programs  
Performance at a Glance**

Strategic Objective	Performance Measure	FY 2024 Target	FY 2024 Results (Actuals)	Performance Status
<b>3.1: Improve the Accuracy and Administration of Our Programs</b>	3.1a: Improve the integrity of the Supplemental Security Income program by focusing our efforts on reducing overpayments <sup>1</sup>	94.00% (OP)	Results available in Summer 2025	<b>TBD</b>
	3.1b: Maintain a high payment accuracy rate by reducing overpayments, in the Old-Age, Survivors, and Disability Insurance program <sup>2</sup>	99.80% (OP)	Results available in Summer 2025	<b>TBD</b>
	3.1c: Ensure the quality of our decisions by achieving the State disability determination services decisional accuracy rate for initial disability decisions	97% decisional accuracy	Results available in January 2025	<b>TBD</b>
	3.1d: Maintain effective cybersecurity and privacy programs	Achieve 90% on the CIO FISMA Metrics Scorecard	Achieved 98% on the CIO FISMA Metrics Scorecard, exceeding the target by 8 percent; increased the number of certified systems with an Authority to Operate by 4.5 percent and increased the number of systems with Multi-Factor Authentication by 3 percent	 <b>Met</b>



Strategic Objective	Performance Measure	FY 2024 Target	FY 2024 Results (Actuals)	Performance Status
<b>3.2: Identify and Eliminate Potential Barriers to Access Contracts and Grants</b>	3.2a: Achieve Small Business Administration annual scorecard success in contracting with Historically Underutilized Business (HUB) Zone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses	Achieve an overall grade of "A" on the SBA scorecard	Results available in Spring 2025	TBD
	3.2b: Increase funding for HBCUs and ISSCs	100% above the 4-year dollar average	Increased funding by 1,628 percent, exceeding our target of 100 percent above the 4-year dollar average (\$350,000); issued RDRC grants to HBCU and ISSC institutions and scholars totaling \$5.7 million	 <b>Met</b>
<b>3.3: Improve Organizational Performance and Policy Implementation</b>	3.3a: Reduce our real property footprint	Achieve an 824,000 USF reduction	Exceeded our target of achieving an 824,000 USF reduction by reducing our real estate footprint by 846,170 USF	 <b>Met</b>

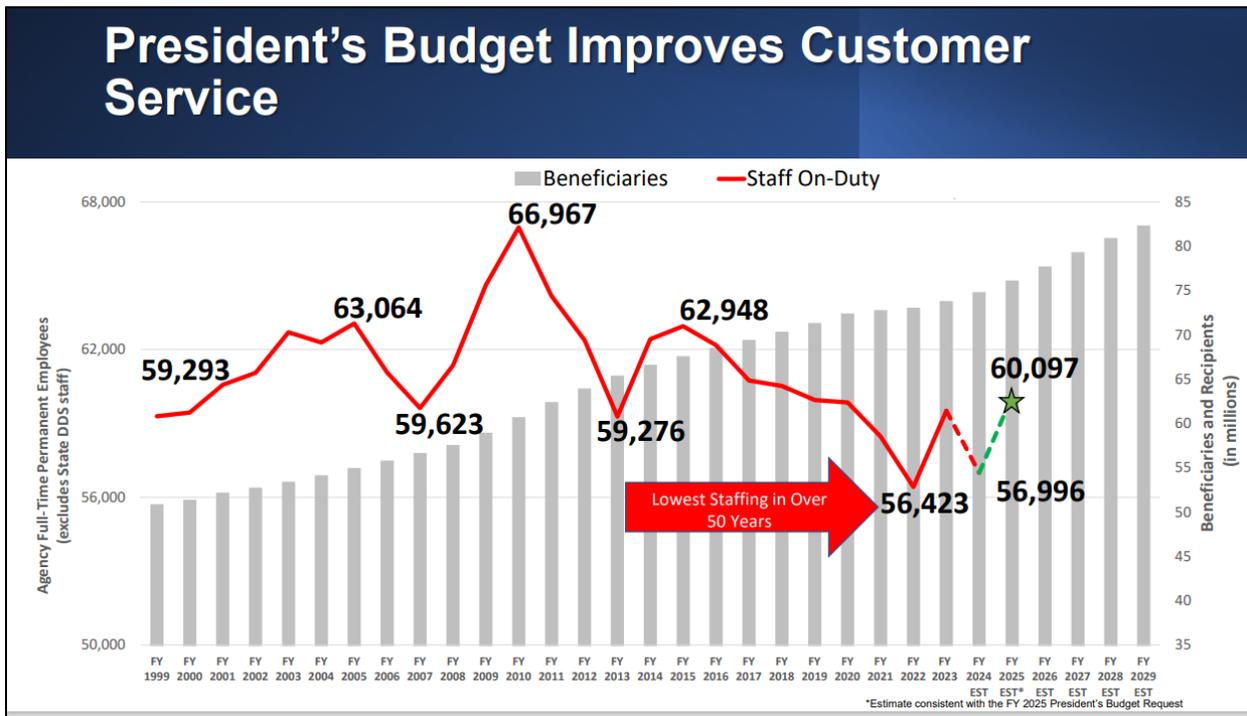
Notes:

1. Annual SSI Stewardship Report results are available in the summer of the following year.
2. Annual OASDI Stewardship Report results are available in the summer of the following year.



## Looking Forward – Facing Our Challenges

We have a service and staffing crisis with record backlogs and people waiting far too long for vital services. In FY 2024, we saw our staffing numbers decline, reaching one of our lowest staffing levels in over 50 years due to years of chronic underfunding while the number of beneficiaries increased. We understand that millions of people depend on us as a financial safety net, because our programs affect nearly every member of the public at various points in their lives: from birth, to entering the workforce, to facing a disability or loss of a family member, to enrolling in Medicare, and when reaching retirement. Recognizing that our programs are lifelines for many, it is imperative that we provide timely and quality service. However, to provide timely service, we must have adequate resources and staff.



Technology has helped us serve more beneficiaries than ever before, and the nature of our work and the demand for face-to-face service means restoring our staffing levels is essential. Hardworking SSA employees are essential to improving service delivery. Within resources, we are moving forward with transformational plans to tackle our challenges.

These plans include improving employee engagement through transparent communication and employee recognition. We will implement ongoing soft skills management training, focused on how to better communicate with staff, and hold agency leadership accountable for employee engagement. We will also analyze additional opportunities to recognize employees' efforts and contributions. We plan to improve recruiting and onboarding processes by developing recruitment resources and establishing an Employee Experience workgroup to evaluate and improve the onboarding experience. We will also resume our information technology (IT) modernization efforts, which were paused mainly due to funding constraints. As we move forward, our focus is twofold: retiring technical debt to reduce investments in outdated and



legacy technology solutions; and simultaneously replacing unsustainable technology to increase enterprise effectiveness, accuracy, speed, and relevance. This approach is essential for ensuring our organization's long-term ability to meet the evolving needs of the public in an increasingly digital landscape. Our technology investments must provide the public with convenient, user-friendly, and secure self-service options, and our frontline employees with updated tools to serve our customers more efficiently. We must accelerate next-generation artificial intelligence and IT systems development that will drive an enhanced customer and employee experience in future years and provide tangible benefits to the public. Additionally, we must combat the persistent and increasingly sophisticated, malicious cyber campaigns that threaten our security and privacy, placing cybersecurity at the forefront of our effort to protect the sensitive information we maintain.

We are committed to climate adaptation and resilience planning to reduce climate change risks. Our [Sustainability Plan](#) and [FYs 2024–2027 Climate Adaptation Plan](#) reaffirms our vision to improve our capacity to assess and build resilience to climate change risks. We provide information on Climate-Related Financial Risk in the *Other Reporting Requirements* section.

We are working to better serve millions of people while maintaining strong stewardship and rigorous oversight of the programs we administer. We discuss additional program challenges as detailed in the *Highlights of Financial Position* section and Note 17, Social Insurance Disclosures, in the *Audited Financial Statements and Additional Information* section.

