



Securing today
and tomorrow

Social Security Administration

Budget Overview
Fiscal Year 2024

MESSAGE FROM THE ACTING COMMISSIONER



I am proud to lead the Social Security Administration (SSA) during a critical period of recovery from the lingering effects of the COVID-19 pandemic. I cannot overstate the unwavering commitment of our talented and dedicated employees who touch the lives of millions of people our programs support. The scope of what we do is enormous. Our programs affect individuals at several points in their lives: from birth, to entering the workforce, to facing a disability or loss, and to retirement. The broad and critical nature of our programs drives our request for the resources necessary to improve our service to the public. The fiscal year (FY) 2024 President's Budget request of \$15.489 billion for our administrative expenses will help us improve our essential service delivery to the public.

In FY 2023, we are rebuilding our workforce, after ending FY 2022 at our lowest staffing level in over 25 years due to prior years of insufficient funding. Our new hires will help us reduce growing backlogs and improve service to the public. Most notably, we must address the significant number of people who are waiting too long for disability decisions at all levels of the disability process. The FY 2024 President's Budget will support increased staffing levels from FY 2023, allowing us to process about a half million more disability cases in FY 2024 than we completed in FY 2022. In addition, we will be able to make significant progress in other key areas, ranging from reducing wait times on our National 800 Number to eliminating our hearings backlog.

We share claimants' frustrations with waiting over seven months on average for an initial disability decision and agree that this is too long. We are confronting historically high employee losses, especially in the disability determination services (DDS) that make the medical determinations for initial disability claims, reconsiderations, and medical continuing disability reviews. As we collaborate with the DDSs to implement new strategies for employee recruitment and retention, we have begun to see a reduction in our attrition. I have activated a team dedicated to finding ways to eliminate the disability backlog. With the FY 2024 President's Budget, we will begin to reduce the wait times for a disability decision, but it will take a multi-year effort and increased funding to eliminate the backlog.

The President's Budget also includes the resources for us to continue strengthening our workforce by addressing near-term recruitment and retention challenges while also focusing on long-term human capital improvements to ensure necessary staffing in our field offices, teleservice centers, processing centers, and hearing offices. To address our urgent needs and expedite hiring, we obtained direct hiring authority in FY 2023 for certain mission-critical positions. Many of our employees choose to work at SSA because they identify with our public service mission. To engage and retain employees, we need to offer manageable workloads, modern tools, and training and development to build a successful career. To retain staff and remain a competitive employer, we are also exploring other longer-term reforms to build and sustain a diverse and skilled workforce to deliver the services Americans depend on for years to come.

Eliminating the hearings backlog remains a priority. We ended FY 2022 with the lowest level of pending hearings in 22 years; we aim to maintain that momentum. In FY 2023, we are experiencing a temporary increase in our hearings average processing time, as we prioritize processing our oldest cases for people who opted during the pandemic to wait for in-person hearings over telephone or video. We anticipate eliminating the hearings backlog and achieving a 270-day monthly average processing time by the end of FY 2024. Once eliminated, we will work to ensure the backlog does not recur.

Our National 800 Number is a critical service channel. With the funding requested, we will improve the customer experience by providing callers with faster service. In FY 2023, we expect to transition our National 800 Number to a modern telecommunication platform, which will improve service by decreasing wait times to speak to a representative and by offering more self-service opportunities for those who prefer not to wait.

The COVID-19 pandemic highlighted the importance of technology, and we were able to pivot quickly to protect the health and safety of our visitors and employees by accelerating modernization of our virtual services. Implementing our [*Information Technology Modernization Plan*](#) has successfully put us on a path to improve automation, optimize operational efficiency, and maximize enterprise productivity. We are focused on creating new digital services to improve the customer and employee experience. The FY 2024 President's Budget request will bolster the ongoing progress to reduce operational costs and provide more digital service options.

We are one of the most important anti-poverty programs in the country. We must ensure that our programs and services are reaching underserved communities and people facing barriers, including individuals experiencing homelessness, income insecurity, with limited English proficiency, and with mental and intellectual disabilities. This Budget will support our Supplemental Security Income outreach work, including collaborating with government agencies and other third-party organizations in local communities to assure convenient access to our services and ensure members of the public are aware of their possible benefit eligibility.

Making the right payment to the right person at the right time is an important tenet in the agency. We recognize the importance of our program integrity workloads to ensure individuals receive the benefits to which they are entitled, while safeguarding the integrity of our programs. We strive to be good stewards of program funds, including through combating waste, fraud, and abuse; quality reviews; cost-effective program integrity work; and payment accuracy efforts. We also know that persistent and increasingly sophisticated malicious cyber campaigns threaten our security and privacy, and so place cybersecurity at the forefront of our effort to protect the sensitive information entrusted to us.

With the FY 2024 President's Budget, we will continue to take on our challenges and make progress in improving service delivery. It is critical that we have sufficient and sustained funding to improve service and support the staffing levels we are restoring in FY 2023. I am grateful for the opportunity to submit a budget that will help us better serve millions of people while maintaining strong stewardship and rigorous oversight of the programs we administer, providing a solid foundation for years to come.

Respectfully,

A handwritten signature in black ink that reads "Kilolo Kijakazi". The signature is written in a cursive, flowing style.

Kilolo Kijakazi, Ph.D., M.S.W.
Acting Commissioner

March 9, 2023

SOCIAL SECURITY ADMINISTRATION OVERVIEW

Program Overview

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

By fiscal year (FY) 2024, we will be delivering approximately \$1.5 trillion in payments directly to our beneficiaries; our administrative costs are only about **1 percent** of our total costs. Our programs are the largest anti-poverty programs in the nation. Further, people spend their benefits to pay for living expenses like housing, clothing, and food, putting money into local and State economies.

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

DI: Established in 1956, the DI program provides benefits for insured workers who meet our disability requirements and their families.

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

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

Component Overview

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

- The Office of Operations provides frontline and support services to millions of customers each year and completes our program integrity (PI) work, ensuring we pay the right person the right amount at the right time:
 - Over 1,200 field offices handle benefit claims, appeals, and post-entitlement events; process applications for Social Security cards; enroll people in Medicare; and address urgent needs and questions from visitors and callers;
 - Our 24 teleservice centers answer a broad range of Social Security and Medicare questions; schedule appointments with our field offices; provide status updates on current claims or appeals; and ensure the accuracy of our records;
 - Our 10 regional offices around the country oversee and support our frontline offices across the nation; and
 - Our 8 processing centers (PC) handle the most complex benefit payment decisions, issue benefit payments after appeals decisions, determine and collect debt, correct records, and perform PI work.
- The Office of Hearings Operations holds hearings and makes decisions on determinations that people have appealed.
- The Office of Systems oversees our large information technology (IT) infrastructure and modernizes, expands, and improves our digital services.
- The Office of Analytics, Review, and Oversight handles the final level of administrative appeals, conducts quality reviews, and oversees agency data, analysis, and fraud prevention.
- The Office of General Counsel (OGC) provides administrative and programmatic legal counsel and prosecutes fraud cases. OGC also oversees privacy protections and ensures that privacy requirements are met.
- Headquarters components, such as human resources, facilities, communications, finance, and policy, support our frontline offices.

There are two other significant parts of our budget:

- The Information Technology Services budget represents the non-staff portion of our IT spending. Even as we focus on enhancing our digital services, approximately two-thirds of this budget keeps our current data centers, computer networks, and phone systems operational and up to date nation-wide.

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

Figure 1: Benefit Payments and Beneficiaries by Program, FYs 2022-2024

Benefits (Outlays in Millions)	FY 2022 Actual	FY 2023 Estimate	FY 2024 Estimate
Trust Fund Programs			
OASI	\$1,063,875	\$1,190,481	\$1,295,057
DI	\$142,277	\$149,285	\$156,893
Subtotal, OASDI	\$1,206,152	\$1,339,766	\$1,451,950
General Fund Programs			
SSI – Federal <i>Note: There will be 13 monthly benefit payments in FY 2022, 12 in FY 2023, and 11 in FY 2024.</i>	\$60,782	\$60,104	\$57,582
SSI State Supplementary Benefits	\$3,025	\$3,380	\$3,275
Total	\$1,269,959	\$1,403,250	\$1,512,807
Beneficiaries (in Thousands)	FY 2022 Actual	FY 2023 Estimate	FY 2024 Estimate
Trust Fund Programs			
OASI	56,258	57,493	58,857
DI	9,146	8,836	8,675
Subtotal, OASDI	65,404	66,329	67,532
General Fund Programs			
SSI Federal Recipients	7,519	7,397	7,318
SSI State Supplementary Recipients (with no Federal SSI payment)	133	137	137
Total, including about 2.5 million concurrent recipients who receive SSI and OASI or DI	73,056	73,863	74,987

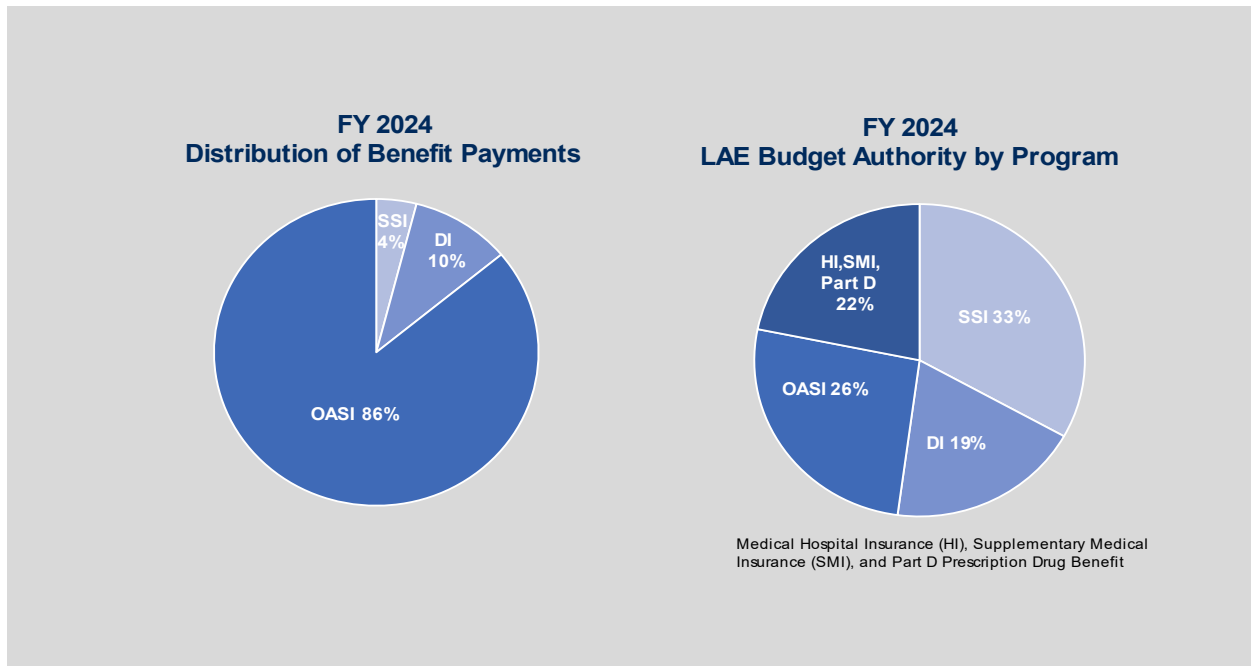
Research Budget

The FY 2024 funding request for research is \$91 million, \$5 million more than the FY 2023 enacted level. As in previous years, the Budget will fund data development and dissemination, modeling efforts, administrative research, and retirement and disability policy research to better serve the public. We are also interested in working with Congress to renew Section 234 authority in order to provide sufficient time to conduct new and ongoing demonstrations. For additional details, please see our Research and Demonstration Projects exhibit in the corresponding technical material, Program Budget section.

Office of the Inspector General

The FY 2024 funding request for the Office of the Inspector General (OIG) is \$120.4 million, an increase of \$5.7 million over the FY 2023 enacted level. The OIG's request would allow the OIG to perform its core mission of auditing and investigating SSA programs and operations, while also building its data analytics capacity, increasing data-driven decision-making, investing in IT and automation tools, and building and strengthening its workforce. The Budget also includes a transfer of \$19.1 million from the allocation adjustment.

Figure 2: Benefits and Administrative Budget by Program



BUDGET HIGHLIGHTS

Our FY 2024 budget request is \$15.5 billion, a nearly \$1.4 billion or 10 percent increase from the FY 2023 enacted level. This increase is necessary to improve services at our field offices, State DDSs, and teleservice centers for retirees, people with disabilities, and their families. The Budget also assists people facing barriers in accessing our services through expanding online tools and improving National 800 Number service, and by adding staff to reduce the wait for a disability decision. For additional detail, please see Figure 3. Major investments include¹:

- **Invest in Frontline Staff to Improve Customer Service.** Total Federal payroll costs of over \$8.7 billion, an increase of nearly \$700 million from the FY 2023 enacted level, funding salaries and benefits of employees in our frontline operations, hearings operations, and support positions. The \$8.7 billion pays for staff in the following areas:
 - **Strengthening Service in Our Field Offices.** The Budget includes an increase of \$250 million to maintain staffing levels for field offices nationwide to better serve the public.
 - **Improving National 800 Number Service.** The Budget includes an increase of \$60 million for teleservice centers to reduce wait times by over 40 percent and substantially reduce busy rates from 15 percent to 3 percent.
 - **Addressing Processing Center Backlogs.** The Budget includes an increase of over \$75 million for PCs to handle more work.
 - **Eliminating the Disability Hearings Backlog.** The Budget includes an increase of almost \$100 million for our hearings offices to eliminate the backlog of disability hearings, decreasing average wait times by one year, from a high of 633 days in September 2017 to 270 days by September 2024.
 - **Reducing the Initial Disability Claims Backlog.** Almost \$2.9 billion supports payroll, hiring, workload processing costs, and other expenses for the State DDSs. This amount is an increase of over \$350 million from our FY 2023 enacted level and funds additional staff and pay increases² needed to help with recruitment and retention. To address the large backlog of initial disability claims and the additional claims we expect to receive in FY 2024, the Budget expands processing capacity by increasing staffing at the DDS offices. As a result, we expect the DDSs to process over 400,000 more initial disability claims and over 200,000 more reconsiderations than in FY 2023.
- **Modernize IT Services for the Future.** Over \$1.7 billion is for IT services funding, an increase of over \$250 million from our FY 2023 enacted level, to help us maintain and modernize our large IT infrastructure and increase our suite of digital and automated services. Our IT budget pays for IT development, servers and computers, ongoing

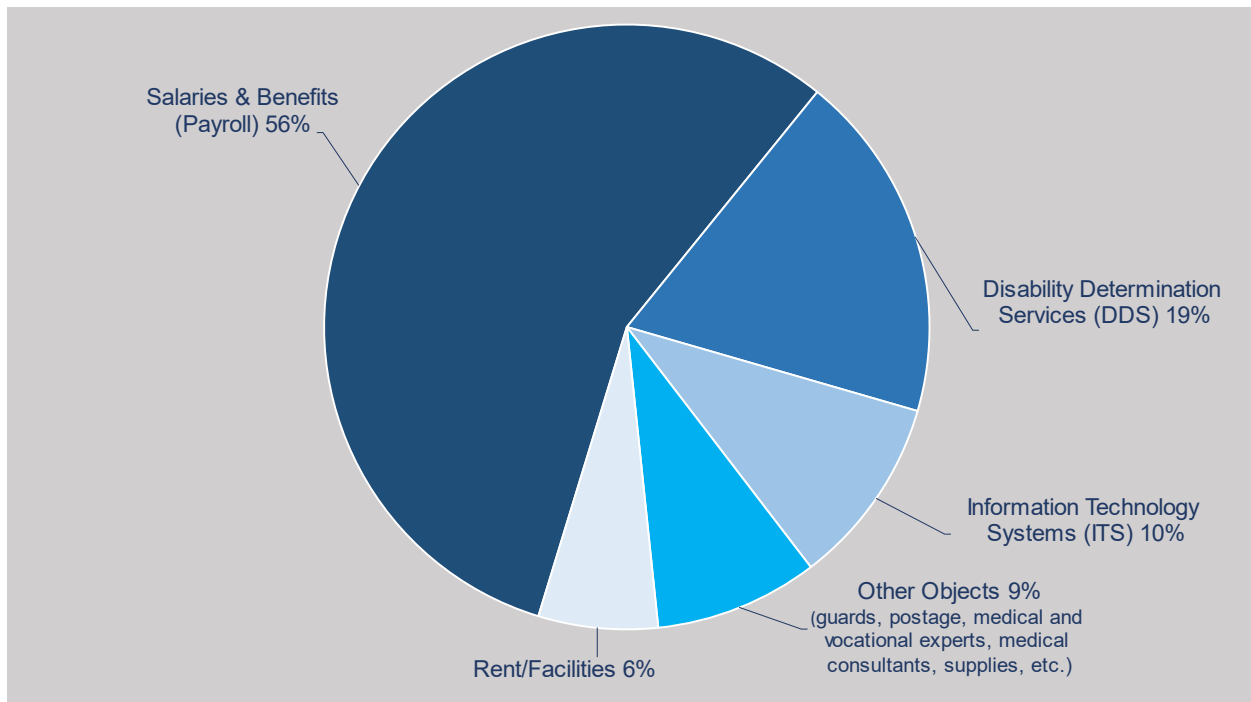
¹ The numbers are not additive to the budget total. Some costs are associated with more than one category.

² SSA funds the full costs, including pay, for State DDS employees. Each State sets their own pay rates, and multiple States are increasing pay to remain competitive.

systems maintenance to keep our offices operational, our telecommunications network, and our data centers that maintain records for the public.

- **Improve Customer Experience and Equity.** The Budget supports significant investments to improve customer experience (CX), service delivery, and equity across our programs. In particular, the Budget invests in building a CX team with the right expertise and talent to integrate human-centered design and build a customer-centric approach to service delivery. The Budget also includes \$9 million in the Department of Health and Human Services Budget for the Centers for Medicare and Medicaid Services (CMS) and SSA to jointly pilot efforts to improve the Medicare enrollment experience. We are also committed to prioritizing actions outlined in our [Equity Action Plan](#). We will continue our outreach to ensure that SSI benefits reach eligible individuals facing barriers to accessing our services, including homeless individuals, children with disabilities, and people with mental and intellectual disabilities.
- **Program Integrity.** Nearly \$1.9 billion, \$86 million above the 2023 enacted level, for dedicated PI work to provide effective stewardship of taxpayer dollars to protect Social Security, so current and future eligible beneficiaries receive the benefits they deserve.

Figure 3: LAE Budget by Major Funding Category, FY 2024 Estimates



FY 2024 FUNDING TABLE

Sustained, sufficient funding for staffing is required to improve service to the public. Figure 4 displays funding and workyears (WY) for our agency.

LAE funding includes \$138 million in FY 2022, \$140 million in FY 2023, and \$150 million in FY 2024 from SSI user fees. The LAE funding also includes \$1 million from Social Security Protection Act user fees in each of those years. The FY 2024 budget assumes LAE appropriations language will provide for 18-month authority to obligate PI funds, similar to prior years.

For Research and Demonstration projects, Congress appropriated \$86 million in 3-year authority in both FY 2022 and FY 2023. The FY 2024 budget proposes \$91 million in FY 2024 (available through September 30, 2026).

Figure 4: Funding Table

Budget Authority and Workyears (WY) ³ (numbers may not add due to rounding)	FY 2022 Enacted	FY 2023 Enacted	FY 2024 President's Budget
Budget Authority, One-Year (Dollars in Millions)			
Limitation on Administrative Expenses (LAE)	\$13,342	\$14,127	\$15,489
<i>(Dedicated Program Integrity Level, Base and Adjustment, included in LAE)</i>	<i>(\$1,708)</i>	<i>(\$1,784)</i>	<i>(\$1,870)</i>
Research and Demonstrations	\$86	\$86	\$91
Office of the Inspector General (OIG)	\$109	\$115	\$120
Total, Budget Authority	\$13,537	\$14,328	\$15,701
SSA WYs	FY 2022 Actual	FY 2023 Estimated	FY 2024 President's Budget
Full-Time Equivalents	57,754	60,177	61,323
Overtime	2,061	2,084	2,084
Lump Sum Leave	280	242	242
Total SSA WY	60,095	62,503	63,649
Disability Determination Services (DDS)	13,825	13,864	14,807
Total SSA/DDS WY	73,920	76,367	78,456
OIG	482	514	540
Total SSA/DDS/ OIG WY	74,402	76,881	78,996

³ A workyear is a measure of time employees are paid to complete work or on leave, equivalent to one person working for one year.

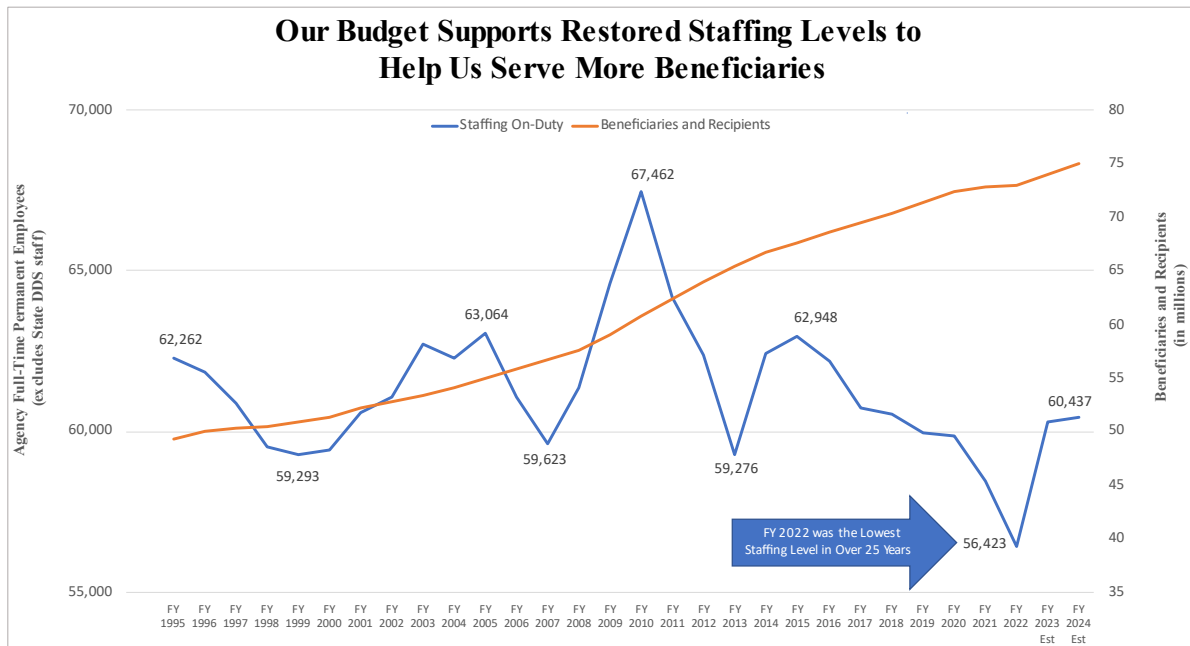
The Summary Statement table in Figure 5 displays the estimated distribution of our costs and WYs by major component group.

Figure 5: FY 2024 Summary Statement Table

Dollars in Thousands	FY 2022 Actual		FY 2023 Estimate		FY 2024 Estimate		FY 2023 vs FY 2024 Increase/(Decrease)	
	Cost	Workyears	Cost	Workyears	Cost	Workyears	Cost	Workyears
Field Offices	\$3,723,183	28,151	\$3,984,683	29,151	\$4,230,609	29,526	\$245,926	375
Teleservice Centers	\$382,044	4,222	\$433,894	4,592	\$489,790	4,876	\$55,896	284
Regional Offices	\$540,381	1,378	\$581,422	1,456	\$603,640	1,510	\$22,218	54
Subtotal, RC Field	\$4,645,609	33,751	\$4,999,999	35,199	\$5,324,039	35,912	\$324,040	713
Program Service Centers and Office of Central Operations	\$1,154,286	10,092	\$1,242,847	10,429	\$1,331,244	10,502	\$88,396	73
Subtotal, Operations	\$5,799,895	43,843	\$6,242,846	45,628	\$6,655,283	46,414	\$412,437	786
Office of Hearings Operations	\$1,348,808	7,768	\$1,420,636	7,781	\$1,531,856	7,880	\$111,220	99
Office of Systems	\$606,344	3,116	\$676,430	3,355	\$753,440	3,508	\$77,011	153
Office of Analytics, Review, and Oversight	\$305,075	1,892	\$325,763	1,944	\$352,646	1,967	\$26,883	23
Office of the General Counsel	\$212,662	708	\$197,316	712	\$217,134	743	\$19,818	31
Headquarters	\$1,311,074	2,578	\$1,473,882	2,883	\$1,532,526	2,937	\$58,644	54
Subtotal, SSA	\$9,583,857	59,905	\$10,336,872	62,303	\$11,042,885	63,449	\$706,013	1,146
ITS	\$1,569,735		\$1,454,000		\$1,718,000		\$264,000	0
DDS	\$2,351,342	13,825	\$2,524,941	13,864	\$2,888,000	14,807	\$363,059	943
Total LAE	\$13,504,934	73,730	\$14,315,813	76,167	\$15,648,885	78,256	\$1,333,072	2,089
OIG Transfer			(\$15,100)		(\$19,100)		(\$4,000)	
Total, LAE after OIG Transfer	\$13,504,934	73,730	\$14,300,713	76,167	\$15,629,785	78,256	\$1,329,072	2,089

Our Budget supports restoring our staffing to pre-pandemic levels. In FY 2022, we reached our lowest staffing level in over 25 years (see Figure 6), and the funding increase in FY 2023 allows us to start to rebuild our staff so that we can begin to reduce backlogs and wait times even as the number of beneficiaries increases. It is critical that we receive sufficient funding in FY 2024 to maintain the staffing increases we plan in FY 2023.

Figure 6: Staffing History



FY 2024 PERFORMANCE TABLE

Our Performance Table shows our actual performance in FY 2022, estimated performance for FY 2023 based on our FY 2023 enacted appropriation, and estimated performance in FY 2024 based on full funding of the FY 2024 President’s Budget (see Figures 7 and 8). Please see the subsequent section on Strategic Goals for a discussion of performance.

Figure 7: FY 2024 Performance Table

Workload and Outcome Measures	FY 2022 ⁴ Actual (52 Weeks)	FY 2022 Actual (53 Weeks)	FY 2023 Enacted	FY 2024 President's Budget
Retirement and Survivor Claims (includes Medicare)				
Retirement and Survivor Claims Completed (thousands)	6,474	6,593	6,524	6,561
Disability Claims				
Initial Disability Claims Receipts (thousands)	2,096	2,142	2,202	2,236
Initial Disability Claims Completed (thousands)	1,843	1,883	1,972	2,402
Initial Disability Claims Pending (thousands)	937	941	1,163	996
Average Processing Time for Initial Disability Claims (days)	184	184	220	195
Disability Reconsiderations				
Disability Reconsiderations Receipts (thousands)	532	542	544	709
Disability Reconsiderations Completed (thousands)	473	483	518	736
Disability Reconsiderations Pending (thousands)	234	234	259	232
Average Processing Time for Disability Reconsiderations (days)	183	183	224	193
Hearings				
Hearings Receipts (thousands)	349	357	364	434
Hearings Completed (thousands)	353	363	364	478
Hearings Pending (thousands)	347	344	344	300
Annual Average Processing Time for Hearings Decisions (days) ⁵	333	337	475	320
National 800 Number				
National 800 Number Calls Handled (millions) ^{6 7}	N/A	27	29	32
Average Speed of Answer (ASA) (minutes)	N/A	33	35	20
Agent Busy Rate (percent)	N/A	6%	15%	3%
Program Integrity				
Periodic Continuing Disability Reviews (CDR) Completed (thousands)	N/A	1,506	1,650	1,675
Full Medical CDRs Completed (included above, thousands)	N/A	590	550	575
SSI Non-Medical Redeterminations Completed (thousands)	2,195	2,203	2,517	2,540
Selected Other Agency Workload Measures				
Social Security Numbers Completed (millions)	16	16	18	18
Annual Earnings Items Completed (millions)	294	294	299	301
Social Security Statements Issued (millions) ⁸	19	19	15	15
Selected Production Workload Measures				
Disability Determination Services Production per Workyear	230	230	241	273
Office of Hearings Operations Production per Workyear ⁹	64	N/A	68	86
Other Work/Service in Support of the Public-Annual Growth of Backlog (workyears) ¹⁰	N/A	N/A	N/A	(400)

⁴ FY 2022 was a 53-week year for management information purposes.

⁵ Average processing time for hearings is an annual figure. In FY 2023, we plan to continue in-person hearings and prioritize individuals who have waited the longest for a hearing, some of whom during the pandemic opted to wait for an in-person hearing rather than have a video or telephone hearing. As we work through those oldest cases, we anticipate a temporary increase in the average processing time in FY 2023 before improving in FY 2024. Projections for the end of year monthly (September) processing time for hearings is 390 days for FY 2023 and 270 days for FY 2024.

⁶ The data reported for FY 2022 is not based on the typical 52 or 53-week management information year; it is based on the fiscal year beginning October 1, 2021, and ending September 30, 2022.

⁷ FY 2023 and FY 2024 estimates include National 800 Number Calls Handled by automation, but the FY 2022 actual figure does not because of technical issues. In FY 2023 and FY 2024, we project about 3.5 million automated calls handled in each year. Performance goals assume successful implementation of the Next Generation Telephony Project in summer 2023 and Call Back Assist in mid-FY 2024.

⁸ The Social Security Statements Issued measure is for paper Statements only (i.e., not electronic statements). In FY 2022, *my Social Security* users accessed their Social Security Statements 55 million times. Consistent with FY 2022, in FYs 2023 and 2024, 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 \$9.1 million and \$9.9 million, respectively. It would cost approximately an additional \$82 million in FY 2024 to send Statements to individuals aged 25 and older who are not receiving Social Security benefits.

⁹ The Office of Hearings Operations Production per Workyear metric is unavailable through 53 weeks in FY 2022. We would not expect 53-week experience to deviate much—if at all—from the 52-week actual performance.

¹⁰ Consistent with the FY 2023 Congressional Operating Plan, we do not have a budgeted workload measure for “Other Work/Service in Support of the Public – Annual Growth in Backlog” in the enacted budget year, although we estimate the increase in the backlog to be equivalent to be 400 workyears in FY 2023.

Figure 8: FY 2024 President’s Budget by Workload¹¹

FY 2024 PRESIDENT’S BUDGET BY MAJOR WORKLOAD

SSA Workloads (Obligations, Dollars in Millions)	FY 2022 Actual	FY 2023 Estimate	FY 2024 Estimate
Retirement and Survivors Claims Completed	\$1,427	\$1,507	\$1,584
Initial Disability Claims Completed	\$3,409	\$3,824	\$4,340
Reconsiderations Completed	\$517	\$530	\$701
Hearings Completed	\$2,268	\$2,434	\$2,680
Social Security Numbers Issued	\$790	\$920	\$931
CDRs and Redeterminations Completed	\$1,683	\$1,721	\$1,815

¹¹ This chart displays costs for some of our major workloads and is not all-inclusive.

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

This Budget focuses on improving the public’s experience with, and access to, our services and programs. In FY 2024, we will continue to build our internal CX capacity, continue to fulfill our commitments in the CX Executive Order (EO), participate in cross-agency life experience projects, and improve our service delivery in our three High Impact Service Provider service designations.

In accordance with EO 14058, [*Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government*](#), we are designing and delivering services that reflect the perspective of the people we serve. Our [*Agency Strategic Plan for FYs 2022-2026*](#) focuses on transformation to deliver lasting change to empower our employees and serve our customers. We are adopting modern ways to operate and re-engineer policy and business models to provide a better experience for our customers. Our CX team coordinates agency-wide CX management practices and standards, and supports, guides, educates, and enables us to ensure we consistently prioritize the customer’s experience. In FY 2023, we hired an experienced industry expert to assess our business practices and make recommendations for achieving our CX goal to continually improving our understanding of our customers, provide easy access to our services across service delivery channels, reduce administrative hurdles and paperwork burdens, enhance transparency, create greater efficiencies across government, and redesign our processes to improve CX. The FY 2024 Budget supports our efforts to build our internal CX capacity through the establishment of a CX team, delivering on our commitments in the CX EO, contributing to cross-agency life experience projects, and make focused improvements to our designated priority services.

For additional details, please see our CX exhibit in the corresponding technical material, LAE section, and [performance.gov](#).

Identify and Address Barriers to Accessing Services

We are working to reduce barriers to access across our programs by identifying and eliminating disparities in service that people with disabilities, workers, and their families may face when doing business with us. The Budget includes funding for outreach in FY 2024 to ensure that individuals eligible for SSI are aware of and can access our services. One of our FYs 2022-2023 Agency Priority Goals (APG) commits to improving equity in our SSI program access through increased outreach and improved benefit delivery, including to communities of color and underserved communities. We expect to increase the number of all SSI applications by 15 percent, restoring rates closer to pre-pandemic levels, and increase the number of SSI applications from underserved communities by 25 percent, both relative to a 2021 baseline, by the end of FY 2023. For a full list of our actions and progress, please see the Advancing Diversity, Equity, Inclusion, and Accessibility exhibit and the Outreach to People Facing Barriers exhibit in the corresponding technical material, LAE section, and [performance.gov](#). Provided below are some highlights.

Accomplishments

- From December 2020 through December 2022, we sent outreach mailers in phases to Social Security beneficiaries who may also be eligible for SSI. In total, we identified 1.4 million potentially eligible individuals, many who may face barriers to our services. The mailer, released in English and Spanish, provided the national toll-free number to assist recipients in determining eligibility for SSI.

Fast facts as of January 2023:

Volume of outreach mailers sent	1.4 million
Applications received	93,042
Applications approved	45,097

- We added content on our [Information for People Helping Others website](#), which provides online assistance to third parties helping people apply for benefits and access our services. We also created a new [Outreach Materials for People Facing Barriers resource page](#) for groups and organizations, along with an updated Resource page for [Faith and Community Partners](#).
- We trained over 1,800 community-based partners committed to helping individuals file SSI applications.
- Our English and Spanish paid social media campaigns promoting SSI for both children and adults, launched March 2021, have generated 2.3 million website visits and over 394.3 million impressions.

Major Initiatives

In FYs 2023 and 2024, we plan to:

- Air television and radio public service announcements, run paid social media and marketing campaigns, and promote the outreach toolkit;
- Implement a zip code-based targeted campaign for underserved communities to increase awareness about SSI and increase SSI applications;
- Expand the scope of our Vulnerable Population Liaisons—who work directly with our third-party partners to provide claims filing and program support—to serve all community-based organizations for individuals seeking to apply for SSI benefits;
- Improve our service delivery by enhancing our online services, reducing the need for people to come into our offices; and

- Use human-centered design activities for customer research, service design, and performance measurement with our cross-functional “Obtaining Adult Disability Benefits” journey transformation team. The team will analyze and consider how policy, business process, and IT impact the customer’s experience when applying for initial disability benefits to inform new CX efforts.

Expand Digital Services

my Social Security, our personalized self-service alternative to telephone and in-person services, gives our customers convenient access to a growing suite of services using their mobile device or computer. As of January 2023, more than 75 million people have signed up to use *my Social Security* to conduct their business online securely and conveniently. In FY 2022, we saw more than 376 million successfully completed online transactions, an 86 million transaction increase from 290 million in FY 2021. We continue to expand our online service options for our customers.

In December 2022, we launched our redesigned ssa.gov website to help our customers find what they need more easily. As part of our ongoing efforts to improve how the public can do business with us, the redesign provides a clear path to the tasks customers need to accomplish. Many of the most visited sections of our website now have a more user-friendly and task-based approach. New pages and improvements based on public feedback will be iteratively unveiled in FY 2023, such as the recent updates to the [Medicare application page](#). We plan to introduce online capabilities and add enhancements to the online experience based on customer feedback and our analyses. The FY 2024 Budget provides for continued digitization of our services and forms that are most viewed or utilized by the public or otherwise important for public engagement, especially those that have non-digital, paper-based, or in-person services without a digital option.

Accomplishments

- Simplified our secure credentials process for *my Social Security* portal access, supporting increased account registrations;
- Launched the redesigned Social Security Statement online via *my Social Security* and by mail, providing users with their earnings records, Social Security and Medicare taxes paid, and future benefit estimates. The Statement also includes targeted supplemental fact sheets and contains links to retirement planning tools, calculators, and other applicable information;
- Implemented and expanded the use of the Internet Social Security Number Replacement Card (iSSNRC) option to request a replacement card for name change due to marriage in certain States;
- Deployed the Online Social Security Number Application Process, which allows people who meet certain criteria to start a Social Security Number application online to decrease the amount of time our customers spend in our field offices and reduce the number of manual inputs required by our technicians; and

- Launched the electronic Protective Filing Tool, enabling potential SSI claimants to establish a protective filing date and set up an appointment to file an application with our field office representatives. To date, we have logged over 500,000 successful transactions through the tool.

Major Initiatives

In FYs 2023 and 2024, we plan to:

- Increase the number of services and forms available on our secure digital platforms to provide more convenient, user-friendly, and secure digital self-service options;
- Increase the number of people who can complete an iSSNRC application by expanding the option of requesting a replacement card for name change due to marriage to additional States;
- Improve the iAppeals online application process by consolidating medical, non-medical, and Office of Appellate Operations online appeal applications into a single-entry point; and
- Implement a mobile-accessible, online process for individuals applying for or receiving services to upload forms, documentation, evidence, or correspondence.

Build a Customer-Focused Organization

Managing the Initial Disability Claims Backlog

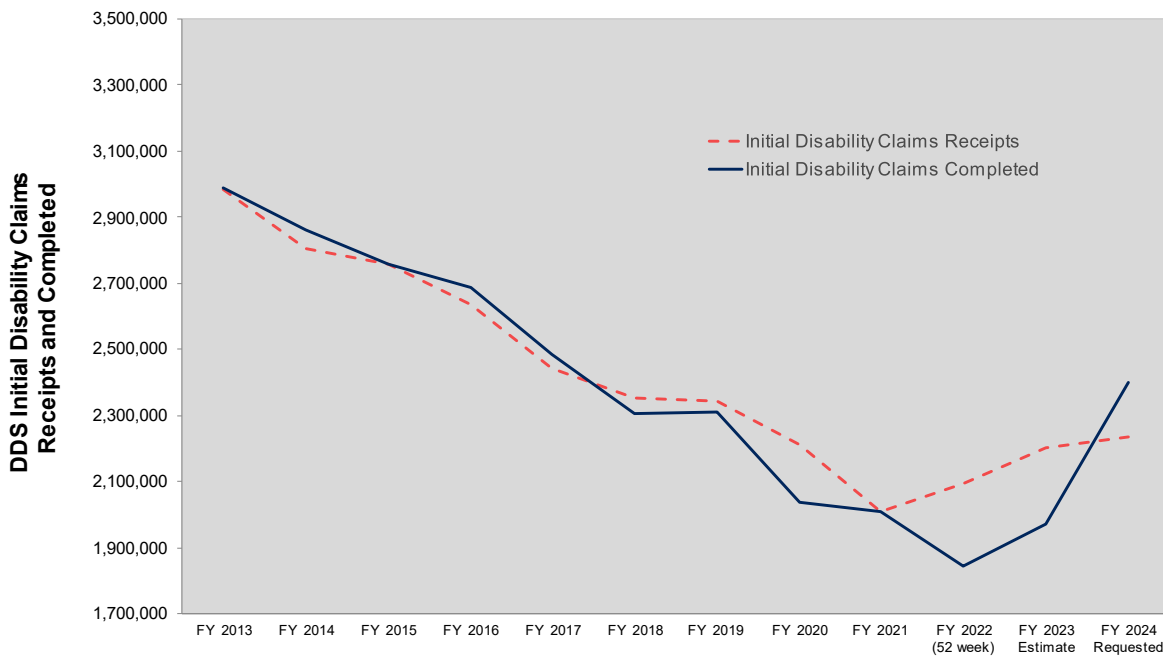
Addressing the initial disability claims backlog is a critical part of improving customer service. The attrition rate for disability examiners, who make disability decisions in the State DDSs, increased to historic highs over the last two years, peaking at almost 25 percent in FY 2022. The FY 2024 Budget will allow us to expand our processing capacity and work towards providing timely disability decisions by supporting recruitment and retention in our State DDSs. As of January 2023, there were over 975,000 initial disability claims and about 240,000 reconsiderations pending with average wait times of about 209 days and 208 days respectively.

We have undertaken a hiring surge to address attrition among the State disability examiners. The Budget builds on the FY 2023 staffing efforts as it would support about 1,000 additional full-time equivalents compared to FY 2023. The Budget also supports maximum levels of overtime in our State DDSs to address the disability backlog.

We must reduce wait times for disability claims, as people should not wait more than half a year to receive initial disability decisions. We have made it a priority to improve the average processing times for initial claims and to work down older cases. Average processing times will temporarily increase in FY 2023 as we focus on claims from individuals who have waited the longest for a disability decision and train new staff. Our goal is to complete at least 85 percent of claims that began FY 2023 180 days or older. In FY 2024, we will begin reducing the average processing time for both initial disability claims and reconsiderations, as our new employees are brought on board and increase our capacity to work through pending claims.

In FY 2024, we plan to complete over 2.4 million initial disability claims—about 560,000 more than in FY 2022 and about 430,000 more than in FY 2023. We anticipate that the initial disability claims pending will grow in FY 2023; however, the Budget will allow us to continue hiring and expanding our processing capacity so that we can complete more cases than we receive, putting us on a path to eliminate the backlog. We plan to reduce the initial disability claims pending by nearly 170,000 in FY 2024 compared to FY 2023 (see Figure 9).

Figure 9: Initial Disability Claims Receipts and Completed, FYs 2014-2024



Major Initiatives

We are prioritizing improving recruitment and retention and increasing processing capacity, as people should not wait more than seven months for an initial disability decision, as projected in 2023.

- We are utilizing staff from across the agency to immediately increase processing capacity in the disability workloads. These cadres include:

- **DDS Assistance Cadre** from the Office of Quality Review to process initial disability claims in key States with some of the greatest backlogs;
 - **Disability Hearings Cadre** comprised of senior attorneys to assist in processing the disability hearing unit workload in the DDSs to allow disability hearing officers in the DDSs to process initial disability claims and CDRs;
 - **Federal Re-employed Annuitants Cadre** consisting of rehired employees, most with disability processing experience, to process initial disability claims; and
 - **Office of Hearings Operations Assistance Cadres** comprised of decision writers to process initial disability claims and CDRs in key States with some of the greatest backlogs.
- We are engaging State DDS Administrators throughout the nation to increase recruitment and retention at the State level as quickly as possible, and we are also working with the Office of Personnel Management (OPM) to make it easier to onboard and train new hires. Initiatives include:
 - **Salaries:** The 2024 Budget will support pay increases for DDS employees to increase the competitiveness of DDS positions;
 - **Background checks:** Working with OPM and our Office of Human Resources to reduce the time to complete background checks for new hires;
 - **Marketing:** Created an overview of job duties and responsibilities for recruitment through video-on-demand while also exploring ways to diversify platforms for recruitment;
 - **Training:** Developing virtual training tools and site-to-site training, which will allow DDS employees to access training across the nation;
 - **Mentoring:** Exploring mentor programs to improve employee morale and increase retention by promoting professional and career growth in the DDS;
 - **Employee Engagement:** Developed employee engagement and exit surveys for use by the DDSs; and
 - **Business Process Strategies:** Identified best practices to utilize examiner time for adjudicative functions and improve efficiency.
 - We are working with States and exploring the use of Federal resources to facilitate more efficient collection of medical evidence by establishing a national contract with medical and psychological consultants needed to make disability decisions, and we issued guidance permitting telehealth for certain consultive examinations.
 - We are exploring flexible, national groups to help the most stressed DDSs.

- We have implemented the Disability Case Processing System (DCPS2), which replaced 52 independently operated legacy systems used by DDSs with a modern, scalable, and secure application capable of providing the flexibility and high performance that the DDSs and Federal sites need to process disability claims timely and efficiently.
- We are using Intelligent Medical-Language Analysis Generation to improve efficiency with lengthy medical report review.
- We are conducting analyses on workload data to identify and eliminate bottlenecks in claims processing.
- We are collaborating with the DDSs to learn first-hand about the issues they are facing and working together on solutions. We are providing budgetary, technological, and policy support to best serve the public.

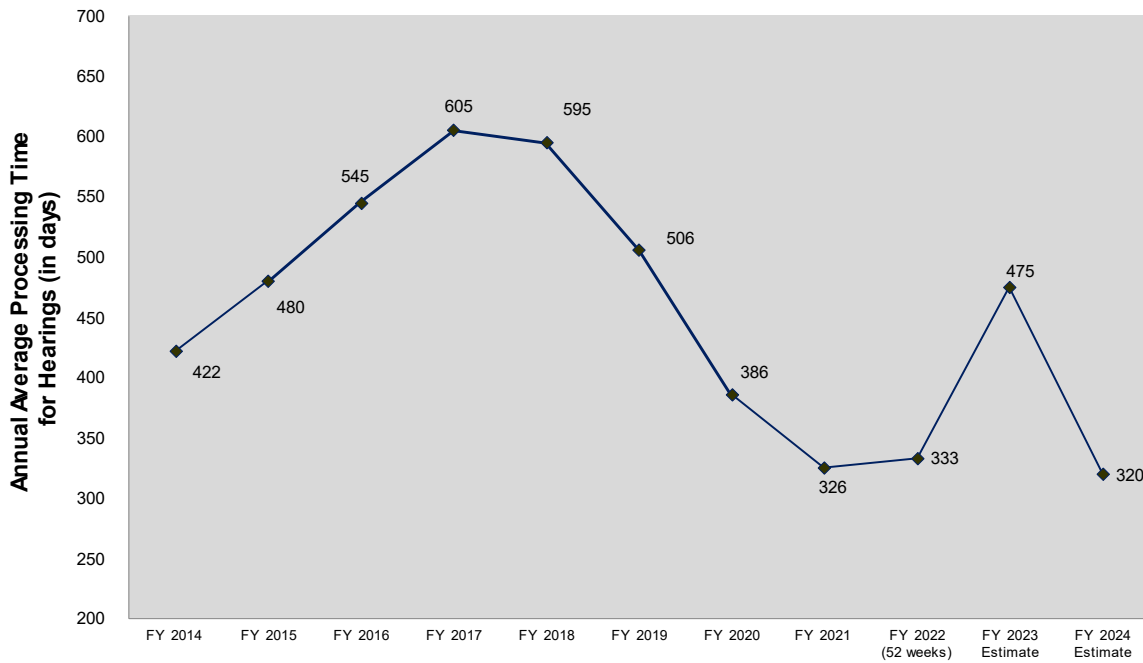
While it will take time to see the results of our activities, we will make progress just as we have done with our hearings backlog. Increases in initial disability claims processing will generate additional claimant appeals, so it is imperative that we stay on track to eliminate the hearings backlog and prevent its reoccurrence.

Eliminating the Disability Hearings Backlog

In FY 2024, we expect increases in hearings receipts, as we complete additional initial disability claims and disability reconsiderations. We are prioritizing our actions to keep pace with completing incoming volumes while reducing the time individuals wait for a hearing. We anticipate eliminating the backlog and achieving a 270-day monthly average wait time by the end of FY 2024.

We are experiencing a temporary increase in the average processing time, because we are prioritizing individuals who have waited the longest and who chose to wait for an in-person hearing rather than accepting a video or telephone hearing when our hearing offices were closed to the public during the pandemic. We project that our monthly average processing time for hearings will be 390 days at the end of FY 2023. The \$55 million in dedicated funding that we received from Congress in FY 2023 has put us on the path to eliminate the backlog by the end of FY 2024. At the end of FY 2022, we began the process to hire administrative law judges for the first time since FY 2018 to prepare for expected workload increases. In addition, we are hiring legal assistants to improve scheduling of hearings in support of our plan to eliminate the backlog.

Figure 10: Hearings Wait Times, FY 2014-FY 2024



Accomplishments

- Reduced our pending number of hearings to under 352,000 cases in January 2023 from the peak of over 1.1 million cases in September 2017; and
- Reduced the average wait time for a hearing to 460 days in January 2023 from the peak of 633 days in September 2017.

Major Initiatives

In FY 2023 and 2024, we plan to:

- Eliminate the hearings backlog by the end of FY 2024 and continue making fair, policy-compliant disability decisions supported by the most efficient, modern business processes; and
- Improve service, in-line quality, and efficiency in our hearings process by adding functionality to our Hearings and Appeals Case Processing System, including eliminating paper forms and wet signatures.

Improving National 800 Number Service

Our National 800 Number representatives offer a variety of services including:

- Answering a broad range of Social Security and Medicare questions;

- Scheduling appointments with our field offices;
- Providing status updates on current claims or appeals; and
- Ensuring the accuracy of our records.

Although more of our customers are using our online services, millions depend on our National 800 Number technicians to answer important questions and use our phone services as the primary method to contact us. The problems with our outdated phone systems have frustrated the public and our telephone agents due to increased busy signals, long waits, and dropped calls. Hiring challenges and high attrition have also impacted service. We are working to address these issues to reduce customer wait times, as it is critical that we provide a stable, reliable, and accessible phone number for people to reach us.

While developing our new National 800 Number system, we experienced unexpected delays. We are working with our contractor to implement phase one of our Next Generation Telephony Project, which will allow us to replace our outdated technology and offer enhanced features, including estimated wait times and increased call capacity.

In FY 2023, we estimate our speed of answer will be approximately 35 minutes compared to 33 minutes in FY 2022, while our busy rate will be 15 percent compared to 6 percent in FY 2022. While this average speed of answer is markedly higher than our APG of under 12 minutes, we are upgrading the systems necessary to reduce customer wait times. In addition to systems upgrades, we are hiring more teleservice representatives and implementing improved training to help us serve the public. With additional staff and successful implementation of our new telecommunication platform, we anticipate noticeable improvement in our performance. In FY 2024, we plan to reduce wait times to 20 minutes and reduce our busy rate to 3 percent (see Figure 11).

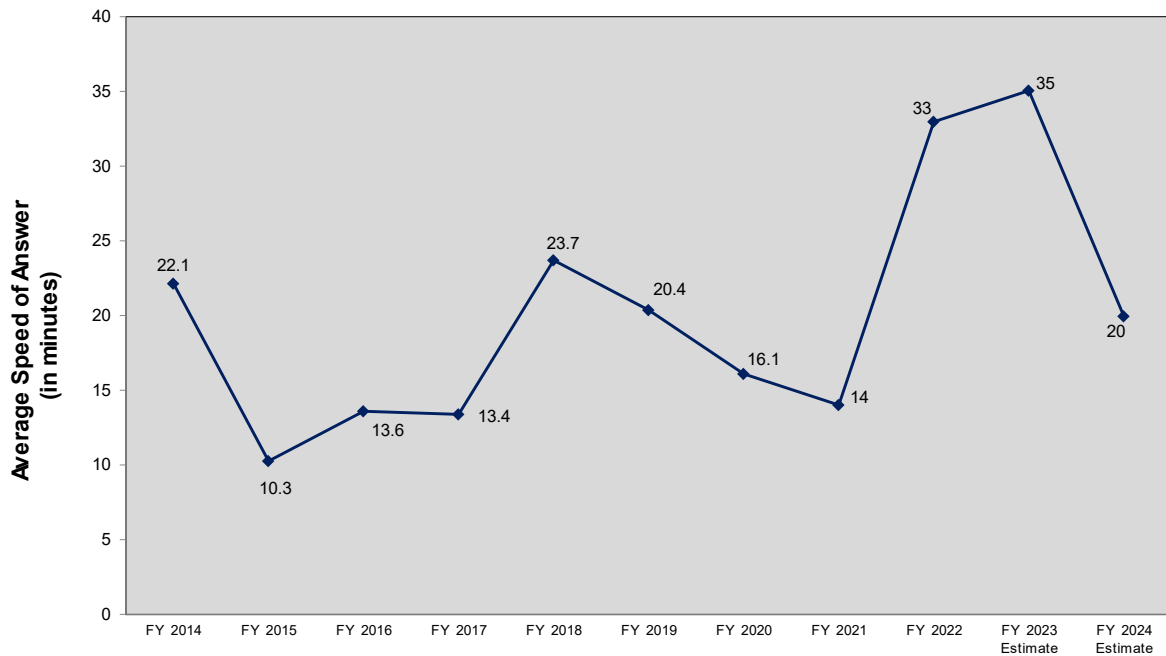
Accomplishments

- Handled about 27 million calls in FY 2022 on the National 800 Number, not including calls handled via our self-service options.

Major Initiatives

- Implement our phone system modernization, the Next Generation Telephony Project.

Figure 11: National 800 Number Wait Times, FY 2014-FY 2024



Strengthening Service in Our Field Offices

Our field offices are critical to provide direct service individuals seeking in-person assistance. Our representatives provide a broad range of services, such as, they:

- Handle benefit claims, appeals, and post-entitlement events;
- Process applications for Social Security cards;
- Enroll people in Medicare;
- Address other important needs and questions from visitors; and
- Play a critical role in our stewardship responsibilities by confirming benefit eligibility.

In FY 2023, we are hiring more customer service representatives to help us more timely serve the public. Our FY 2024 Budget supports our FY 2023 hiring and will help us reduce claims processing times and decrease our pending workloads, although waiting times for initial disability decisions will remain higher than in FY 2022.

We are employing new strategies to serve people visiting our offices as efficiently as possible. We encourage people to first go online for services or call us to schedule an appointment, which prevents them from waiting in long lines, reduces office wait times, and allows us to better serve anyone who requires in-person service.

The Budget invests in our frontline staff so that we provide timely help to people who need our assistance. The Budget also invests in IT modernization to provide convenient digital and automated services so that many of our customers do not need to visit a field office, as well as provide our employees user-friendly systems and tools to perform their work. We are improving CX in our field offices by providing options that will make visits to our field offices easier, such as an enhanced mobile check-in application, expanding enumeration self-scheduling, and exploring additional self-scheduling options.

Accomplishments

- Resumed all in-person services in all our offices in spring 2022; and
- Served over 13 million visitors and answered nearly 42 million calls in FY 2022.

Major Initiatives

- Introduce in FY 2023 and expand in FY 2024 online self-service scheduling capabilities for enumeration actions to make it easier for people to schedule an appointment with us; and
- Reduce the need to come into the field offices through improved online capabilities, allowing our employees to serve other customers.

Addressing Processing Center Backlogs

Our PC technicians handle the most complex benefit payment decisions. In addition, they:

- Adjudicate benefit payment after appeals decisions;
- Determine and collect debt;
- Correct records; and
- Perform stewardship work.

Our PC staff remain focused on addressing a backlog of pending actions that has reached about 4.2 million in FY 2022. The increase is due to a combination of challenges including an increase in receipts from FY 2021 to FY 2022, lower overtime in FY 2022 compared to previous years, and higher-than-normal attrition rates. Our FY 2024 Budget, along with hiring more technicians in FY 2023, will help us to work towards decreasing our PC technicians' processing time for incoming actions, improving payment timeliness, and implementing automation to eliminate duplicate work. In FYs 2023 and 2024, we will target high priority workloads in our PCs with a focus on processing the oldest pending cases and triaging incoming workloads.

Accomplishments

- Obtained direct hiring authority to hire PC technicians quickly; and
- Began onboarding new hires to increase our capacity to process workloads with large volumes of pending actions, working to decrease processing time for incoming actions.

Major Initiatives

- Streamline and clarify workload policies, achieving consistency in quality assessments, and developing enhancements in training; and
- Implement automation initiatives that allow technicians to complete simple tasks more quickly, eliminate duplicate work, and help us reduce pending cases.

Modernizing Our Information Technology

We continue to modernize our IT to meet the needs of more people. The President's Budget funding will allow us to accelerate our business process and technology modernization to enable more seamless, intuitive, and secure service. Our investment in modern technology will allow us to assess and make changes in our workflow that will benefit our customers and employees, and provide service that is user-friendly, easily accessible, equitable, and effective for everyone.

FY 2022 was the final year of our 5-year [*IT Modernization Plan \(2020 Update\)*](#). In FY 2023, we are shifting our strategy to digital modernization that will build on the successes delivered in our IT modernization efforts and guide our plan to use technology to improve service delivery.

We will implement new digital services that focus on enhancing CX and removing barriers to service to meet the needs and preferences of our customers, partners, and employees. Our modernization investments focus on delivering customer-centric digital capabilities with human-centered design, business intelligence, and mobile accessible platforms. Additionally, we are prioritizing self-service options to improve customer service.

Accomplishments

- Enhanced our Mobile Visitor Intake Process Check-In system, which allows visitors to check-in for in-office appointments from their mobile device. The public can now elect to receive email and text reminders for appointments and check-in on their mobile devices before they arrive at our office;
- Expanded the availability of electronic notices through [my Social Security](#) and offered customers the choice to opt-out of receiving mailed notices they can receive electronically through the portal;
- Expanded online service delivery options for customers by providing individuals with the ability to track claims online instead of having to call or visit a field office;

- Created macros for the PCs that reduce keystrokes and manual coding and detect exceptions and alerts before they occur, which improve payment timeliness and accuracy by automating work;
- Enabled direct access to Registered Appointed Representative Services for our hearings staff, reducing the burden on our field operations and decreasing case processing delays;
- Established a centralized online VoC feedback collection supporting all service channels to inform our service strategies across all channels; and
- Received support from the Technology Modernization Fund to accelerate Multi-factor Authentication (MFA) to improve SSA’s security posture and reduce risks from compromised credentials. We will accelerate phishing-resistant MFA for all internal agency systems, which will support service to the public.

Major Initiatives

In FYs 2023 and 2024, we plan to:

- Simplify the process to apply for SSI benefits;
- Introduce our online self-service scheduling capabilities for a limited set of services and automate more services on our website, including adding more customer-centric portals, mobile applications, and claim status information;
- Focus on reducing the burden on the public by eliminating requirements to conduct business in person and to present hard copies of original documents, and by removing requirements for signature on documents or offering electronic signing options;
- Implement modern Customer Relationship Management software for employees who interview the public in our field offices and on our National 800 Number, providing efficiencies in inputting, retrieving, and working with visitor and caller information;
- Create and upgrade robotic macros to make our PCs more efficient; and
- Use insights derived from our VoC feedback collection to develop and implement human-centered design solutions to address customer pain points and improve customer satisfaction.

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

Our employees are the heart of the agency, and we must foster an environment that allows them to develop and succeed. Increasing demands on a declining number of staff has reduced morale, which we see in our Federal Employee Viewpoint and Pulse Survey results. While technology has helped us serve more beneficiaries than ever before, it cannot replace the staff necessary to complete our complex workloads. We are taking the steps to empower our workforce and ensure inclusion, fairness, accessibility, and equity. We plan to continue efforts to develop a comprehensive human capital strategy that focuses on addressing acute near-term recruitment and retention challenges, while also focusing on longer term activities that will strengthen our workforce over time.

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

A well-trained dedicated workforce that reflects the diversity of our customers is essential. Our goal is to improve policies and practices to maintain a representative workforce, including identifying and fostering talent, using multiple means to announce vacancies, supporting new members of the workforce, educating management about bias to ensure fair promotion processes, addressing any potential barriers in accessing job opportunities, addressing technological barriers for employees with disabilities, and remaining in compliance with the Architectural Barriers Act Accessibility Standards.

Strategic Workforce Planning (SWP) is a proactive planning approach for our current and future workforce to ensure the effective acquisition, development, and retention of a talented and diverse workforce. In FY 2023, we will use the SWP framework and business process to inform the development and implementation of the *FYs 2023–2026 Human Capital Operating Plan*. We will also develop a comprehensive strategy to identify and reduce staffing and skill gaps within mission critical and leadership positions.

Development for human capital includes providing opportunities for current and future employees, including internship programs. In FY 2022, we improved our intern hiring and plan to onboard approximately 750 interns in FY 2023. Our FY 2024 Budget allows us to invest in efforts to reach communities that are underserved and underrepresented, and our intern program, supporting hiring opportunities and paid internships that provide meaningful work experiences to students.

Support Employees' Chosen Career Paths

Our agency acknowledges our employees' abilities and encourages them in their chosen career paths. Developing our employees begins with leadership, which is why we are committed to investing in ongoing training and development opportunities for managers. Giving managers foundational tools to perform their responsibilities positions them to train and manage the performance of their staff, enhance employee engagement, increase productivity, and improve

retention. We must ensure resources are available for frontline supervisor training with a focus on employee communication, mentorship, and equity. In addition, we are providing opportunities for employees of all levels to participate in development programs that will broaden their skills and prepare them for the next step in their career paths.

Accomplishments

- Adopted an efficient and effective succession planning business process, using an automated tool (wePrepare) that allows for agency-wide data collection, reporting, and collaboration;
- Announced the Senior Executive Service (SES) Candidate Development Program to ensure a pipeline of ready successors for critical SES positions;
- Identified and reduced leadership competency gaps through use of assessments and development opportunities among 90 percent of the National Leadership Development Program (NLDP) participants;
- Reviewed policies and procedures (e.g., vacancy announcements, eligibility criteria, accommodations requests) to ensure an agency diversity, equity, inclusion, and accessibility (DEIA) strategy to address potential barriers to full participation and advancement in the workplace;
- Implemented mandatory DEIA training for all agency executives and managers; and
- Completed two workshops related to veterans: “Understanding Trauma and Post-Traumatic Stress Disorder” and “Work-Life Services Briefing.”

Major Initiatives

In FYs 2023 and 2024, we plan to:

- Test the wePrepare succession planning module in preparation for national rollout;
- Announce a reengineered NLDP for employees agency-wide, address barriers that prevent underrepresented groups from applying for or attaining promotions, and promote equity in leadership development;
- Implement Leadership Fundamentals, a multi-year online and self-paced curriculum that provides sequential training for managers within the first three years of their supervisory roles. The curriculum includes personnel management, labor and employee relations, managing a diverse workplace, managing performance, and health and safety training;
- Implement internal and external DEIA strategies, policies, practices, and processes, including releasing the Civil Rights and Diversity Empowerment Portal, which will serve as a consolidated training site, and expanding our training to include new topics such as neurodiversity;

- Implement and enhance our *Improving Workforce Morale Plans* based on benchmarking and research of current trends and best practices in employee engagement; and
- Promote the use of special hiring authorities to appoint specific groups of individuals who meet the respective eligibility requirements to positions in the Federal government, such as people with disabilities, veterans, and military spouses.

STRATEGIC GOAL 3: *ENSURE STEWARDSHIP OF SSA PROGRAMS*

Improve the Accuracy and Administration of Our Programs

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

Supporting Our Cost-Effective Program Integrity Work

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

Regaining currency in our medical CDR workload is important, nonetheless, our immediate priority is to serve the public who have claims pending with us and address the needs of individuals who had trouble reaching us during the pandemic. In FY 2024, we expect to complete 575,000 full medical CDRs, making further progress toward CDR currency, and 2.5 million SSI redeterminations.

The proposed \$1.87 billion in discretionary funding is essential in providing the dedicated resources supporting the effective stewardship of program dollars. For additional details please see our PI exhibit in our corresponding technical materials, LAE section.

Enhancing Our Payment Accuracy Efforts

We are committed to reducing improper payments for each program. We conduct quality reviews to determine our payment accuracy rate and assess our business processes to determine factors contributing to improper payments. We have identified the root causes of some payment inaccuracies (e.g., self-reporting, untimely processing), and created strategies to mitigate overpayments and underpayments. We have developed the Improper Payments Alignment

Strategies (IPAS) to address corrective actions. As part of our IPAS, we are evaluating the effectiveness of completed corrective actions and mitigation initiatives. For additional detail and a list of our initiatives, please see our Improper Payment exhibit in our corresponding technical materials, LAE section.

Enhancing Our Fraud Prevention and Detection Activities

In addition to our PI and payment accuracy efforts, we are pursuing initiatives to combat fraud. For example, our National Anti-Fraud Committee provides a forum for leaders to collaborate and provide guidance on fraud challenges and mitigation opportunities. We are developing our Enterprise Fraud Risk Management program and conducting Fraud Risk Assessments for our programs, while providing training to our employees to equip them with tools to effectively prevent, detect, and resolve fraud issues.

Accomplishments

- Partnered with OIG, State DDSs, and State and local law enforcement to operate CDI units to investigate suspected fraud before we award benefits and during the CDR process. In FY 2022, we satisfied our goal of covering all 50 States and the U.S. territories;
- Initiated a fraud risk profile and completed several fraud risk assessments to ensure the integrity of our programs; and
- Enhanced our privacy risk management process to align with updated National Institutes of Standards and Technology guidance.

Major Initiatives

- In 2023, we plan to initiate a re-assessment of fraud risk in the disability program and complete the enumeration and debt management fraud risk assessments and Title II fraud risk profile; and
- In FY 2024, we plan to complete the disability program fraud risk re-assessment, and the enumeration and debt management fraud risk profiles. We also plan to continue to modernize our anti-fraud systems.

Addressing the Climate Crisis

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

We are committed to transitioning our vehicle fleet to Zero Emission Vehicles (ZEV) and to reducing our carbon footprint and greenhouse gas emissions in our vehicle fleet. We are analyzing our vehicle utilization and eliminating under-utilized vehicles while simultaneously replacing older vehicles with ZEVs. We have started transitioning to the goal of 100 percent

acquisition of ZEVs by 2035 including 100 percent light-duty acquisitions by 2027. Our ZEV target for LAE-funded vehicles for FY 2024 is 11 vehicles, followed by 18 vehicles in FY 2025.

Investing in Cybersecurity to Safeguard our Data

We are implementing the cybersecurity measures under EO 14028, [*Improving the Nation's Cybersecurity*](#). Maintaining the public's trust in our ability to protect sensitive data requires advanced cybersecurity controls, constant assessment of the threat landscape, and continual enhancements to our cybersecurity program. We must be vigilant and protect against network intrusions and improper data access by strengthening our defensive cyber capabilities, sharing cyber threat information with our Federal and industry partners, and making new investments to establish a Zero Trust Architecture. The FY 2024 Budget provides for **\$376 million** in cybersecurity funding. For additional details, please see our IT exhibit in our corresponding technical materials, LAE section.

Accomplishments

- We enhanced our security controls to address the risks inherent in our legacy applications, ensuring continuous monitoring, a comprehensive integrity review process, and employee access to only the resources that are appropriate for their job function.

Major Initiatives

In FYs 2023 and 2024, we plan to:

- Update privacy protection and compliance training for employees based on their role within the agency; and
- Implement phishing-resistant authentication.

Identify and Eliminate Potential Barriers to Access Contracts and Grants

Bolster open competition in the acquisition and grants process

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

about their experiences with our procurement process, barriers they encountered, and recommended solutions to eliminate these barriers.

Accomplishments

- Encouraged Retirement and Disability Research Consortium (RDRC) centers to expand their researcher networks by soliciting research grant applications from HBCU and ISSC scholars. In FY 2022, 11 RDRC research projects involved scholars from HBCUs and ISSCs, including Howard University, Bowie State University, and University of Maryland-Eastern Shore. RDRC shared information on grant funding opportunities with over 35 HBCUs throughout the regions. RDRC centers also partnered with ISSCs to offer research training programs to graduate students and undergraduate students;
- Participated in the 2022 HBCU Week Career and Recruitment Fair to provide information about research, grant, and cooperative agreement opportunities and the process for applying for those opportunities;
- Identified specific points of contact at various ISSCs and professional organizations with the goal of creating a Listserv to enable us to quickly engage directly with individuals with interests in our research programs;
- Held an Industry Day on October 19, 2022, which was open to all small businesses, including HUBZone, Veteran-owned, and women-owned, to inform contractors of upcoming IT modernization initiatives and contracting opportunities; and
- Upgraded the Small Business Forecasting tool, on our [Office of Small and Disadvantaged Business Utilization webpage](#), to provide more timely and robust information to small businesses.

Major Initiatives

In FYs 2023 and 2024, we plan to:

- Track the percentage of research grants and procurement opportunities we award to HBCUs, ISSCs, and small and disadvantaged businesses to evaluate and improve our outreach and engagement efforts and ensure access to our research grants and procurement opportunities;
- Finalize development of the ISSCs Listserv and utilize the tool to engage with research community;
- Finalize the “Guidelines on Eliminating Barriers to SSA Funding Opportunities” document;
- Partner with other agencies to identify best practices for increasing participation by HBCUs and ISSCs in grant, cooperative agreement, and contracting opportunities;

- Present to HBCUs and ISSC the information needed to apply to enter a 5-year cooperative agreement with our agency as a RDRC research center;
- Invite HBCUs and ISSCs to participate in an information session for the re-compete of the 5-year cooperative agreement for the Analyzing Relationships Between Disability, Rehabilitation, and Work;
- Work with the Small Business Administration Procurement Center Representative to identify contractors who can meet our needs and help us ensure equity for underrepresented groups;
- Conduct monthly outreach meetings with the vendor community to discuss upcoming contracting opportunities and help small businesses, including HUBZone businesses and other disadvantaged businesses, find possible subcontracting opportunities; and
- Create language for a Small Business Evaluation Factor to use in our General Services Administration Schedule procurements.

Improve Organizational Performance and Policy Implementation

Simplify Our Policies and Procedures

We are streamlining, simplifying, and advancing policy and procedures to meet the needs of our beneficiaries, make our programs more responsive, reduce burden on our customers, and ensure that our employees can easily and consistently apply our rules. We are updating our program policy and IT to ensure that our disability determinations reflect and keep pace with modern medicine and technological advancements in healthcare. We will make evidence-based decisions guided by available science and data, collect data where it is lacking, and improve our capacity to develop and implement evidence-based policies across our programs. For example, in FYs 2023 and 2024, we will continue working with the Department of Labor's Bureau of Labor Statistics to collect updated information on the occupational requirements of work in the national economy, which, combined with other sources of occupational data, will enable us to develop an Occupational Information System.

SSI Simplification

We propose to revise our regulations and to simplify policies and business processes to make it easier for people, especially individuals facing barriers, to establish protective filings. These revisions include removal of the requirement to sign a written inquiry, so that third parties may assist potential claimants with submitting written statements. We are also updating our temporarily institutionalization benefits process by making it easier for recipients facing barriers, representative payees, and institutions to obtain the statement of need and the physician's certification all on one standardized document. Finally, we are working to simplify our policy around In-Kind Support and Maintenance (ISM). ISM is unearned income in the form of food and shelter and can affect the SSI benefit amount. We published a Notice of Proposed

Rulemaking to discontinue food expenses as a source of ISM; and we are in development of two new Notices of Proposed Rulemaking related to how we consider a person's living arrangements with respect to ISM. We are also using user-centered design to streamline the SSI application, which we will make available online.

Disability Determination Case Processing Enhancements

We are improving disability case processing through our enterprise-wide efforts to develop and implement modern, national claims processing systems that will seamlessly interact with each other from initial claim filing through a final appeal decision. In FY 2022, we fully deployed DCPS2 to all DDSs to provide increased efficiencies and improved customer service through business process modernizations. In FYs 2023 and 2024, we will support ongoing DCPS2 operations and develop and modernize new capabilities to reduce dependency on inefficient and outdated software applications.

We are bringing decision support tools using artificial intelligence technologies, machine learning, and predictive analytics to many aspects of the disability determination process to improve decisional accuracy and policy compliance.

Expand Strategic Partnerships with External Partners

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

We are updating our memorandum of understanding and reimbursable agreement with the Department of Agriculture. This agreement describes our role for informing every applicant for, or recipient of, Social Security benefits or SSI of the availability of SNAP benefits. We are also required to offer to take SNAP applications for SSI applicants or recipients who live in households consisting only of SSI applicants or recipients (i.e., pure SSI households), at SSI application and at redetermination for SSI eligibility.

We are working with CMS on increased collection and sharing of our existing race and ethnicity data. We already share our enumeration data, with plans to increase the voluntary collection of race and ethnicity data as outlined in our [Equity Action Plan](#).

Accomplishments

- Implemented our national DCPS2 to improve our disability process; and
- Implemented an electronic SSI Protective Filing tool that allows internet users to express interest in applying for SSI and request an appointment to file an application for benefits, thereby establishing a protective filing date instead of calling us or visiting a field office.

Major Initiatives

In FYs 2023 and 2024, we plan to:

- Share data with other agencies to improve equity and access to government programs;
- Simplify our process to apply for SSI benefits online; and
- Improve data collection for program data on race and ethnicity.

OTHER ADMINISTRATION INITIATIVES: *LOOKING TOWARD THE FUTURE*

Protects the Benefits that Americans Have Earned

The Administration is committed to protecting and strengthening Social Security and opposes any attempt to cut Social Security benefits. The Administration looks forward to working with the Congress to strengthen Social Security by ensuring high-income individuals pay their fair share. In addition, the Administration looks forward to improving the Supplemental Security Income program to help low-income older Americans and people with disabilities afford their basic needs.

Provides National, Comprehensive Paid Family and Medical Leave

The vast majority of America's workers do not have access to paid family leave, including three out of four private sector workers. Among the lowest-paid workers, who are predominantly women and workers of color, 92 percent have no access to paid family leave through their employers. As many as one in five retirees leave the workforce earlier than planned to care for an ill family member, which negatively impacts families as well as the Nation's labor supply and productivity. The Budget proposes to establish a national, comprehensive paid family and medical leave program administered by SSA. The program would: provide workers with progressive, partial wage replacement to take time off for family and medical reasons; include robust administrative funding; and use an inclusive family definition. The Budget would provide up to 12 weeks of leave to allow eligible workers to take time off to: care for and bond with a new child; care for a seriously ill loved one; heal from their own serious illness; address circumstances arising from a loved one's military deployment; or find safety from domestic violence, sexual assault, or stalking. The Budget would also provide up to three days to grieve the death of a loved one. The Administration looks forward to continuing to work with the Congress to make this critical investment and strengthen America's economy.



Securing today
and tomorrow