



# In First 100 Days, Commissioner O'Malley Leads a New Era for Social Security

***Martin O'Malley's leadership unleashes a series of changes to tackle the agency's customer service crisis.***

Since day one, Commissioner O'Malley has listened to frontline employees across the country to identify operational and policy changes that will improve customer service amidst the reality of a 27-year low in staffing.

1. To improve customer service, Commissioner O'Malley began with visits to Social Security Administration (SSA) offices in all ten regions and hosted town halls across the country. He continues to gather ideas directly from frontline employees and customers, from managers and labor union partners, and from advocates for beneficiaries and claimants.
2. In February, Commissioner O'Malley launched **SecurityStat**—a cross-cutting performance management program—to accelerate the deployment of customer service improvements. SecurityStat brings top executives and subject matter experts together every two weeks to identify problems and solutions and follow-through on necessary changes. SecurityStat offers a new and unprecedented level of transparency for the agency's stakeholders.
3. As a result of this collaborative, data-driven approach, the agency has implemented changes more rapidly to address **Commissioner O'Malley's top three priority areas:**
  - **National 800 Number customer wait times;**
  - **Average processing time for disability determinations; and**
  - **Overpayment and underpayment injustices.**

Since Commissioner O'Malley was confirmed by the Senate and sworn in, he has implemented dozens of process improvements and efficiencies to attack these customer service priorities.

The changes help reduce time-consuming, administrative burdens on seniors and people with disabilities applying for or managing their benefits. The changes also help make employee workloads more manageable. While these changes will save over 1,000 work years, these process improvements will only go so far.

The running list of changes so far for customers and agency employees include:

## NATIONAL 800 NUMBER

### Help for Customers Contacting SSA by Phone

Between November and April, SSA has reduced the average waiting time from 42 minutes to 24 minutes. Further, no one calling SSA receives busy signals and over 35 percent of our callers now receive a call back instead of holding.

SSA offers great alternatives to calling by providing more online services and clearer information in SSA's outbound communications (like mailed notices or via [www.ssa.gov](http://www.ssa.gov)). New practices have been deployed to resolve customers' needs on the first call. So far, specific enhancements include:

- **Guiding customers to the right place:**
  - SSA is updating its Program Operations Manual System (POMS) so agency employees are no longer forced to require wet signatures from customers where eSignature options are available.

- SSA has worked with the Centers for Medicare & Medicaid Services (CMS) to remove SSA's 1-800 Number from many resources and instead point to SSA.gov for more information.
- **Using multiple strategies to help shorten hold times:**
  - SSA has updated its phone system to more easily re-route calls to other available agents and offer Call Back Assist (CBA) to more callers.
  - Additionally, SSA has greatly shortened the message customers first hear when they call us.
- **To help prevent SSA calls from appearing as spam,** SSA has registered local field office phone numbers so our customers see that SSA is calling them regarding their claim.
- **Providing more accurate estimates of wait times:**
  - Millions of notices have been updated to reflect current processing timeframes for disability decisions, which means fewer calls from applicants who used to be given erroneous expectations about when their claim would be processed.

## DISABILITY DETERMINATIONS

### Changes to Reduce Administrative Burdens and Improve Access for People with Disabilities

SSA has made historic progress in reducing the number of pending hearings before an Administrative Law Judge. For the first time in decades, **SSA has reduced the number of pending hearings to below 300,000**. This milestone marks the lowest total number of pending hearings in 30 years.

Under SSA's definition of disability, a person's medical conditions must prevent them from engaging in substantial gainful activity.

- In the past, we asked people applying for disability benefits to provide details about their work history going back 15 years.
  - Our new rule – effective June 8, 2024 – will **reduce the past relevant work period from fifteen to five years**. SSA published this regulatory policy change on April 18, and we are currently preparing instructions for staff to implement. This rule will reduce burden on claimants and staff while still providing enough information to make accurate decisions.
- In 100 days, SSA published three regulations over three weeks to streamline what we count as income for **calculating SSI eligibility and payments**.
  - First, SSA will no longer count food assistance when it calculates SSI payment amounts or eligibility. Second, a simpler rental subsidy calculation will now be SSA's nationwide policy, instead of only applying in seven States. Third, SSA is revising the definition of a public assistance household to include the Supplemental Nutrition Assistance Program and households where not all members receive public assistance.
  - All three rules will be effective September 30, 2024. Together, these rules will reduce administrative burden for applicants, recipients, and SSA.
- SSA is restoring a pre-2018 policy – allowing technicians in local offices to apply a prior determination of disability. This change, called **collateral estoppel**, will help reduce duplication and processing times.
- Sub-regulatory policy revisions, and associated systems changes were implemented on March 12 to **prevent duplicate protective filings in SSA's electronic SSI Protective Filing tool**. This change creates efficiencies in the appointment processes, reduces confusion for technicians and the public, and results in administrative savings.

- Quality representation – from initial claims to appeals – helps people navigate SSA’s disability programs. To remove a potential barrier for people looking for quality representation, SSA is raising the fee cap for claimants’ representatives.

## OVERPAYMENTS AND UNDERPAYMENTS

### Key Updates to Address Improper Payments

SSA strives to pay the right amount, to the right person, at the right time with a high degree of accuracy over a massive scale (over 72 million people as of March 2024). However, if the agency overpays a beneficiary, Congress requires recovery of payment.

- Effective March 25, 2024, SSA stopped intercepting 100 percent of an overpaid beneficiary’s monthly Social Security benefit by default if they fail to respond to repayment requests.
  - The agency will now use a much **more reasonable default withholding rate of 10 percent of monthly benefits** — the same current rate in the Supplemental Security Income (SSI) program.
- SSA is reframing its guidance and procedures so that the **burden of proof shifts away from the claimant** in determining whether there is evidence that the claimant was at fault in causing the overpayment.
- SSA will now **approve repayment plans of up to 60 months** without requesting income and asset information for the vast majority of beneficiaries who request to work out a repayment plan.
- SSA will make it **easier to request a waiver of repayment** in no fault cases where a beneficiary is without the ability to repay the error.
- In March, the **SSI underpayment threshold** that requires peer review was updated from \$5,000 to \$15,000. This change for the majority of newly-approved claims and appeals allows an eligible recipient to receive benefits more quickly, while allowing employees to perform other vital work.
  - Upon implementation, nearly 43,000 cases in the backlog of underpayment cases were resolved.
- **To reduce improper payments:**
  - SSA published a notice of proposed rulemaking (NPRM) to implement a payroll information exchange, which is another important step by automating wage reporting for more beneficiaries. The comment period on the NPRM closed on April 15, and we are working towards implementation of the exchange.
  - SSA collaborates with the Department of the Treasury, the Office of Management and Budget, and the States to deliver SSA’s **Full Death Master File** to Treasury’s Do Not Pay.

## INVESTING IN OUR WORKFORCE

### Staffing Levels

- On March 23, President Biden signed into law the Further Consolidated Appropriations Act, 2024, which finalized SSA’s FY 2024 funding level at \$14.277 billion to operate through September 30, 2024.
  - Since then, Commissioner O’Malley has lifted the agency-wide hiring freeze and approved 1,600 critical hires for the teleservice centers. We also authorized 1,290 field office hires, 600 hires for the State disability determination services, and 300 hires for our hearing offices.
- **Increased onsite presence** for approximately 6,000 headquarters and regional employees. (Employees in local offices increased their onsite presence starting in April 2022.)

- This change brings SSA into alignment with other federal agencies across government who have been increasing their own onsite presence and increases opportunities for collaboration, engagement, and innovation.
- The Commissioner also made use of the fitness centers in headquarters and regions **available to all employees at no cost** to help improve employee wellness and morale. Since implementing this change, over 2,250 employees have taken advantage of this service.
- **New agency policy for Domestic Employees Teleworking Overseas:** SSA aligned its policy with Section 6202 of the FY 2022 National Defense Authorization Act (Public Law 117–81, December 27, 2021) to better support military spouse employees.

## **Improved Labor Relations and Renewed Focus on Training and Leadership Development**

- Ongoing and continuing education opportunities include:
  - Virtual, half day classes on the topic of “Problem Solving” for GS-11 and below employees, increasing bench strength and skill for SSA.
  - eLearning programs for customer-facing employees.
  - New opportunity for GS-7 thru GS-11 employees to attend “Preparing to Lead” training program offered by the Partnership for Public Service.
- Commissioner O’Malley, through SSA’s Office of Labor-Management and Employee Relations, has generated a more open line of dialogue between Management and Labor. Regular discussions have prompted the implementation of improvements for employee work-life balance, such as the American Federation of Government Employees (AFGE) Episodic Telework Memorandum of Understanding, swift rollout of the Automated Medicare Process, improvements in the use of Common Calendar, and more.
- New Union Management Cooperation Councils (UMCCs) – which the Special Advisor to the Federal Labor Relations Authority described as being at the forefront of Union-Management collaboration – are engaged in productive and specific pre-decisional discussions between AFGE and SSA management on a variety of topics including improvements to new-hire training, which has been a key area for improvement towards retention of staff.
- Monthly Labor Roundtables and the UMCC provide regular opportunities to maintain an open dialogue between Labor and Management at all levels of SSA, which improves employee morale and efficiency.

## **PROGRAM SIMPLIFICATIONS WITH PROCESS AND TECHNOLOGY ENHANCEMENTS**

### **More Ways to Save Customers and Employees Time**

The agency is reducing the paper burden on customers and employees.

- **Removing wet signatures whenever possible:**
  - SSA recently launched first-party **eSignature and document upload** to local offices and Workload Support Units nationwide (about 28,000 employees).
  - So far, the agency has approved the removal of wet signatures on 13 forms, accounting for over 1 million submissions per year. SSA is currently reviewing other forms that account for over 3 million submissions per year.

- SSA is working with the Internal Revenue Service (IRS) to develop and implement a process, allowing attestation for a W-4V Voluntary Withholding Request form instead of requiring SSA employees to send the form to customers for a wet signature.
- **Centralizing and digitizing mail processing:**
  - SSA expanded this business process to an additional 7 local offices in the Philadelphia Region, bringing the total to 10 local offices whose mail is scanned centrally at the Wilkes-Barre Direct Operations Center and accessed by offices electronically.
- **Optimizing workloads:**
  - Since work volumes can vary by locality, SSA is expanding its use of **Common Calendars**. Customers can schedule appointments more quickly.
  - SSA is also making it easier for local offices to share workloads in other tasks as needed, while safeguarding beneficiary information.
- **Simplifying policy:**
  - For lump sum death payment cases, SSA is eliminating involved development for living in the same household, which will reduce the burden on survivors.
- **More automation:**
  - SSA has also implemented **Automated Medicare Process (AMP)** for back-end processing of online Medicare claims. AMP will reduce processing time from 7 minutes to 7 seconds, freeing up the equivalent of around 40 people in Workload Support Units for other critical tasks.
  - During one of Commissioner O'Malley's regional visits, an employee in Boston identified the need for a simple technology fix to create a **"no to all" button** (similar to "select all") within the claims-taking process on SSI applications. The "no-to-all" button saves employees and customers time during the application process. SSA was able to implement this fix within 4 weeks of the Commissioner first hearing the time-saving fix.
  - SSA is increasing use of Intelligent Medical Language Analysis Generation, or **IMAGEN**. The tool helps employees complete disability determinations by identifying and organizing evidence and allowing employees to input notes within the evidence. In February, IMAGEN was rolled out to Disability Determination Services (DDSs) for use with Continuing Disability Reviews.
  - To help reduce duplicative 1696 Forms and the number of calls to local offices, an enhancement to the Appointed Representative System was implemented in January, which allows appointed representatives and advocates to see which SSA-1696 Forms they submitted have been processed.

## Help with a Social Security Number (SSN) Card Without Visiting a Local Office

- In February, SSA added Colorado, Virginia, and Wisconsin to the list of states where customers can update their SSN with a name change due to marriage – without visiting a local office – by using our online replacement Social Security Number card application process.
  - 17 states now allow applicants to apply online for a replacement SSN card with a name change due to marriage.
  - SSA is now on track to add additional states in FY 2024 and expand our online replacement SSN card throughout the country.
- SSA is now on track to process one million more Enumeration Beyond Entry applications in FY 2024 compared to FY 2023, which reduces foot traffic in local offices and card centers from naturalized citizen applications.

## Increased Focus on Helping Children

- SSA is revising its sub-regulatory policy on dedicated account reporting responsibilities to make it easier for representative payees to use **the funds for child SSI recipients' needs**.
- To improve service and outcomes for **youth in foster care**, SSA is providing technical assistance to states who are considering changes to state laws and policies, so beneficiary youths “aging out” of foster care are better served.

## Fraud, Waste, and Abuse Prevention

- SSA continues to improve processes to report potential fraud and to train our employees on fraud identification and prevention.
- We are increasing use of geographic analysis to detect potentially fraudulent trends and enhanced analytics to monitor online transactions, resulting in program efficiencies and improved service to impacted customers.

## Better Communications Overall

- **Technician Experience Dashboard:** SSA completed the rollout of its Customer Relationship Management platform to all local offices and Workload Support Units to provide technicians a holistic view of the customer, including a transaction history, and a modernized path for inputs, saving time and improving accuracy, as well as improving interactions with our customers.
- **Redesigned disability content on SSA.gov:** SSA is making it easier for the public to read and understand content on its website in both English and Spanish. The goal is to provide clearer instructions on how to file for disability benefits via self-service options and set better expectations about wait times.
  - Seventy-eight percent of English-speaking visitors and 88 percent of Spanish-speaking visitors have rated the new content helpful.
  - SSA’s new Limited English Proficiency (LEP) Hub is designed to help SSA employees help customers with limited English proficiency.
- **Created new Notices Review Team** to ensure notices are understandable for customers and to explore ways to reduce administrative printing and postage costs of notices.
  - We are revising our sub-regulatory policy to add **Customer Experience (CX) Review** to our Notice Clearance Process. Making CX review a standard part of the Notice Clearance Review Process will help ensure customers are informed and guided, so they know what they need to do and when they need to do it.
- **Streamlining communications to new Medicare enrollees**
  - SSA worked with CMS to add a button to the [Medicare application confirmation screen](#) on SSA.gov, which led users to a [new landing page](#) specially tailored for customers who just signed up for Part A and/or B, driving roughly 20,000 new users to the Medicare Getting Started page each month, and serving about 100,000 visitors since it went live in November 2023.



Securing today  
and tomorrow

Social Security Administration  
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