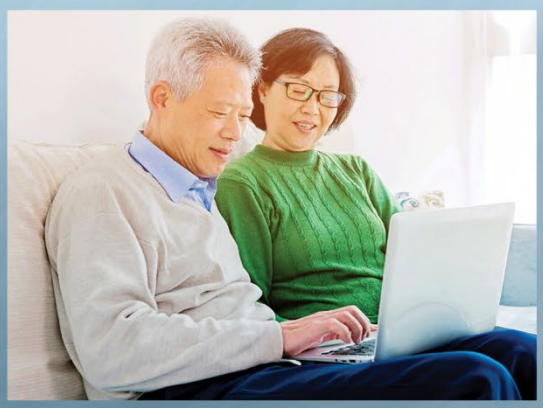
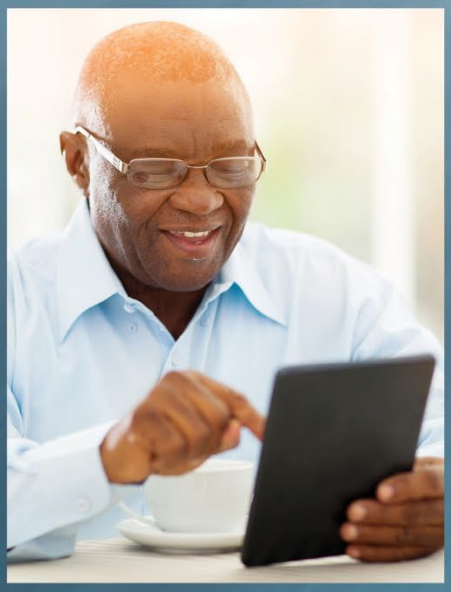
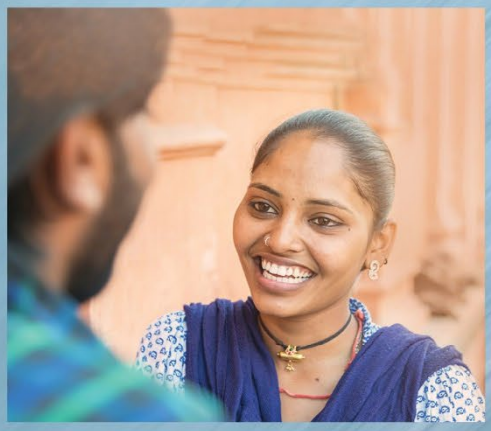
Social Security Administration

Annual Performance Report for Fiscal Year 2024







Securing today and tomorrow

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Message from the Acting Commissioner

As the Acting Commissioner of the Social Security Administration (SSA), and a passionate public servant, it is my pleasure to present our *Annual Performance Report for Fiscal Year 2024,* which details our accomplishments.

To address our most critical customer service concerns, we have dedicated our time and our resources to improving customer service, in our top three priority areas: National 800 Number customer wait times, average processing time for disability determinations and overpayment and underpayment process improvements. We have implemented dozens of process improvements and efficiencies to address these and other customer service challenges. These changes have helped reduce time-consuming, administrative burdens on people applying for or managing their benefits. As one of the most important anti-poverty programs in the country, millions of people depend on us for financial security. We are committed to ensuring equity in delivering and improving accessibility to our services.

Our dedicated employees share my commitment to providing outstanding service to our customers. With this goal in mind, we 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 share information timely, deploy resources quickly, and conduct relentless follow-ups. SecurityStat offers a new and unprecedented level of transparency for our agency and stakeholders.

SecurityStat allows us to closely examine how we provide service and develop plans to drive tangible actions for the public. For instance, millions of customers count on our National 800 Number technicians to answer important questions; yet we know many people have experienced unacceptable delays waiting to speak with an agent, particularly during our peak call times. We instituted a series of changes to reduce the average wait time. Our average speed of answer for the month of September 2024 was 11.3 minutes, down from last September, when it was 34.7 minutes. We also redesigned our training curriculum for new telephone agents to include job simulations, interactive scenarios, and call-taking earlier in the training process.

One of the most critical issues we face right now is the significant number of people who are waiting too long—almost eight months on average—for a disability decision. We are working to add more disability examiners in State disability determination services (DDS) nationwide and to provide disability examiners with improved technology to gather and review medical evidence. Increasing capacity in our State DDSs will reduce the time our customers are waiting to receive an initial determination.

We are acting promptly to address customer service issues related to overpayments. Our overhaul of burdensome overpayment recovery policies demonstrates our commitment to using a common-sense and compassionate approach to serve our customers. These long-overdue changes such as changing the default recovery rate from 100 percent of an overpaid beneficiary's monthly Social Security benefit to 10 percent, ensure fair and equitable administration of our programs and provide individuals with the financial stability that Social Security benefits were designed to deliver. We will make improvements in every corner of our

agency, address our many challenges, and deliver results that will profoundly and positively impact people's lives.

Based on internal evaluations, I affirm that the performance data in this report is complete, reliable, and accurate.

Respectfully,

Carolyn W. Colvin

Baltimore, Maryland
January 17, 2025

Vision

Provide income security for the diverse population we serve.

Mission

Ensure equity and accessibility in delivering Social Security services by improving the customer experience and addressing systemic barriers to participation in our programs.

Programs

Few government agencies affect the lives of as many people as we do. We administer three programs under the Social Security Act, as amended:

- **Old-Age and Survivors Insurance (OASI):** Established in 1935, the OASI program provides monthly retirement and survivors benefits to qualified workers and their family members. In fiscal year (FY) 2024, we paid OASI benefits to an average of approximately 59 million beneficiaries each month, and we paid almost $1.3 trillion to OASI beneficiaries through the fiscal year.
- **Disability Insurance (DI):** Established in 1956, the DI program provides monthly benefits for workers who become disabled and their families. In FY 2024, we paid DI benefits to an average of approximately 8 million beneficiaries each month, and we paid $154 billion[4] to DI beneficiaries through the fiscal year.
- **Supplemental Security Income (SSI):** Established in 1972, the SSI program provides monthly financial support to aged, blind, and disabled adults and children who have limited income and resources. In FY 2024, we paid SSI benefits to a monthly average of 7.4 million recipients (approximately 2.5 million of whom concurrently receive OASI or DI benefits), and we paid $61 billion[4] above in SSI Federal benefits and State supplementary payments through the fiscal year.

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

We administer our programs in accordance with law and regulations. We have implemented enterprise risk management processes to improve the effectiveness of our organization and program administration. Our goals are informed by strategic opportunities as well as our assessment of program evaluations, our Learning Agenda, and identified risks.

[4] Represents the amount of benefits paid to beneficiaries and recipients during the fiscal year, net of reimbursements.

Organization

At the end of FY 2024, over 58,000 Federal employees and 14,000 State employees served the public from a network of more than 1,500 offices across the country and around the world. We administer our programs and services online, by phone, by video, and in person in our offices. Our customers can access online services such as applying for retirement, disability, and Medicare benefits; checking the status of an application or appeal; or requesting a replacement Social Security card.

A diverse, engaged, and well-trained workforce is critical to meeting our service delivery goals. Our employees either directly serve the public or provide support to employees who do. We support our workforce throughout their chosen career paths by fostering an engaging workplace environment and by providing training and development opportunities.

The State disability determination services (DDS) make disability determinations for initial claims, reconsiderations, continuing disability reviews (CDR), and CDR appeals. Challenges with hiring and retaining staff have limited the State DDSs' capacity to sustain disability workload performance.

Administrative law judges (ALJ) in our hearing offices and administrative appeals judges in our Appeals Council decide appealed cases. We have achieved our goal of eliminating the ALJ disability hearings backlog and plan to prevent its reoccurrence.

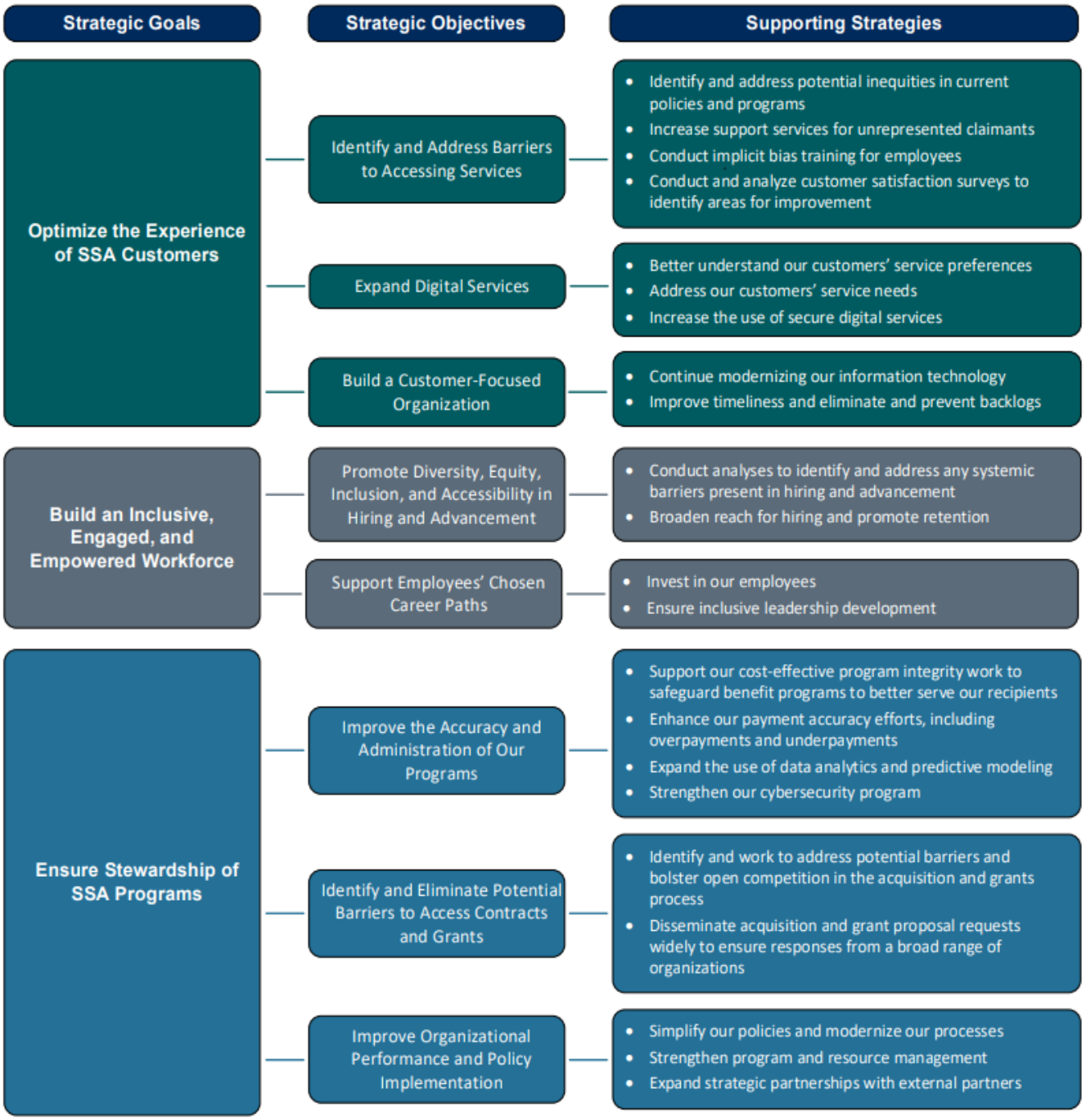
Our processing centers (PC) handle the most complex benefit payment decisions, in addition to issuing benefit payments after appeals decisions, determining and collecting debt, correcting records, and performing program integrity work.

Our teleservice centers answer a broad range of Social Security and Medicare questions, schedule appointments for our field offices, provide status updates on current claims or appeals, and ensure the accuracy of our records.

For more information about our organization and its functions, visit our organizational structure webpage (https://www.ssa.gov/org/).

Strategic Framework

This Annual Performance Report addresses the strategic goals, objectives, and strategies in our *Agency Strategic Plan for Fiscal Years 2022–2026* as required by the *Government Performance and Results (GPRA) Modernization Act of 2010*. We assess our progress by the performance measures and targets for each strategic objective.



Cross-Agency Priority Goals

The *GPRA Modernization Act of 2010* requires agencies to address Cross-Agency Priority Goals in our strategic plan, annual performance plan and report. Refer to Performance.gov for our contributions to those goals and progress.

Agency Priority Goals

Agency Priority Goals (APG) are 24-month goals that reflect our top performance improvement priorities and key commitments for advancing the President's Management Agenda, as required by the *GPRA Modernization Act of 2010*. We established three APGs for FYs 2024–2025. Our APGs support multiple objectives across our strategic plan. The following tables include our APGs and targets, FY 2024 results, and the strategic objectives most closely aligned with each APG. Visit Performance.gov for more information about how our APGs reflect our key priorities.

FYs 2024 – 2025 Agency Priority Goals	FY 2025 Target	FY 2024 Progress
Improve Equity in the Supplemental Security Income Program Improve equity in the Supplemental Security Income (SSI) program by increasing underpayment processing of our oldest and highest priority cases, including those disproportionately impacted by poverty Strategic Objective 1.1: Identify and Address Barriers to Accessing Services	• By September 30, 2025, complete 98 percent of SSI underpayments that have been identified as priority cases or pending for a year or more at the beginning of fiscal year 2024	• We completed nearly 65 percent of SSI underpayments that were identified as priority cases or pending for a year or more at the beginning of FY 2024.[5]
Improve the National 800 Number Service Improve the customer experience by reducing the wait time to answer the phone on the National 800 Number Strategic Objective 1.3: Build a Customer-Focused Organization	• By September 30, 2025, achieve an average speed of answer of 12 minutes, including implementation of estimated wait time and call back options* * This target is also a budgeted workload measure.	• Our FY 2024 average speed of answer was 27.6 minutes.[5]
Improve Initial Disability Claims Improve the customer experience by reducing the wait time for an initial disability claim decision Strategic Objective 1.3: Build a Customer-Focused Organization	• By September 30, 2025, achieve an average processing time for initial disability claims of 215 days* • By September 30, 2025, decide 92 percent of pending initial disability claims that begin the fiscal year 180 days old or older * This target is also a budgeted workload measure.	• Our average processing time for initial disability claims in FY 2024 was 231 days.[5] • We decided about 95 percent of pending initial disability claims that began FY 2024 180 days old or older.

[5] This narrative provides FY 2024 results, which represents interim progress towards a two-year target for the period ending September 30, 2025.

Performance Measures At A Glance

The following table shows our FY 2024 performance measures (excluding agency priority goals and budgeted workload measures), aligned with our FYs 2022–2026 Agency Strategic Plan.

Strategic Goal 1: Optimize the Experience of SSA Customers	
1.1: Identify and Address Barriers to Accessing Services	1.1a: Redesign SSA's website to enhance the user's online experience
	1.1b: Collect customer feedback
1.2: Expand Digital Services	1.2a: Increase the number of successfully completed online transactions
1.3: Build a Customer-Focused Organization	1.3a: Provide uninterrupted access to our systems during scheduled times of operations
	1.3b: Modernize evidence acquisition systems to drive increased electronic medical evidence volumes through a multi-channel strategy
	1.3c: Improve customer service by addressing the number of actions pending at the processing centers
Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce	
2.1: Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement	2.1a: Increase the use of workforce data analyses to support strategic workforce planning and decision making
2.2: Support Employees' Chosen Career Paths	2.2a: Improve employee engagement
	2.2b: Ensure new supervisors receive timely leadership training
	2.2c: Strengthen manager accountability for effective performance management
Strategic Goal 3: Ensure Stewardship of SSA Programs	
3.1: Improve the Accuracy and Administration of Our Programs	3.1a: Improve the integrity of the Supplemental Security Income Program by focusing our efforts on reducing overpayments
	3.1b: Maintain a high payment accuracy rate by reducing overpayments, in the Old-Age, Survivors, and Disability Insurance Program
	3.1c: Ensure the quality of our decisions by achieving the State disability determination services decisional accuracy rate for initial disability decisions
	3.1d: Maintain effective cybersecurity and privacy programs
3.2: Identify and Eliminate Potential Barriers to Access Contracts and Grants	3.2a: Achieve Small Business Administration annual scorecard success in contracting with Historically Underutilized Business Zone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses
	3.2b: Increase funding for Historically Black Colleges and Universities and Institutions Serving Students of Color
3.3: Improve Organizational Performance and Policy Implementation	3.3a: Reduce our real property footprint

Strategic Objective 1.1: Identify and Address Barriers to Accessing Services

Leads: Deputy Commissioner for Operations and Deputy Commissioner for Retirement and Disability Policy

Strategies:

Identify and address potential inequities in current policies and programs

Increase support services for unrepresented claimants

Conduct implicit bias training for employees

Conduct and analyze customer satisfaction surveys to identify areas for improvement

FY 2024 Performance Measure Target and Results (see details)		
1.1a: Redesign SSA's website to enhance the user's online experience	Achieve a 1% increase in satisfaction for customers using SSA's website over FY 2023 results (target CSAT 71.0)	**Met**
1.1b: Collect Customer Feedback	Establish baseline customer experience scores for priority service designations	**Met**

What Did We Accomplish in FY 2024?

- Launched a public-facing SecurityStat website to track the agency's progress toward achieving top customer service goals.
- Increased the threshold amount required for an SSI underpayment review from $5,000 to $15,000. This change expedited the release of underpayments for approximately 198,000 SSI recipients.
- Launched new Disability, Survivor, Windfall Elimination Provision/Government Pension Offset, and Family sections on SSA.gov written in plain language and translated into Spanish.
- Achieved a 100 percent score on SSA.gov for digital indicators, a measure of effectiveness from the Digital Experience Council.
- Updated more than 1,400 kiosks at 1,217 field offices with accessible/508 compliant software.
- Released our first global Language Access Plan, which includes our Limited English Proficiency (LEP) policy and Language Access Implementation Plan.
- Released agency-wide Diversity, Equity, Inclusion, and Accessibility (DEIA) training for our employees that make claims decisions. This training is available to all employees, and it aligns with our commitment to promote fair and unbiased adjudication.
- Increased access to the SSI program by collaborating with third-party claims-taking partners who submitted more than 9,700 SSI claims and by conducting almost 2,400 outreach events in targeted ZIP Codes of underserved communities.
- Created and collected feedback on 25 Voice of the Customer Surveys, which also included customer comments. These surveys provide a proactive and consistent approach to capturing our customers' needs, expectations, preferences, and experiences.
- Identified over 200 customer pain points and produced a comprehensive journey map to enhance initial disability claims customer experience.
- Completed contract negotiations with seven States to include race and ethnicity data through Enumeration at Birth (EAB).

Strategy: Identify and address potential inequities in current policies and programs

We expanded our network of advocates and community-based organizations to help us address the needs of people facing potential barriers to accessing our services.

Ensure Equity and Conduct Outreach: Our Agency Equity Team coordinates interagency efforts and opportunities to advance equity in our programs, consistent with the policies in Executive Order (EO) 13985, *Advancing Racial Equity and Support for Underserved Communities through the Federal Government,* and EO 14091, *Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*. We conducted outreach to help those in underserved communities. We are dedicated to ensuring that people with LEP have meaningful access to federally assisted programs and activities. Our Language Access Plan provides guidance for accessing our benefits, services, and information for individuals with LEP and who are deaf or hard of hearing. This plan includes guidance on activities such as bilingual recruitment efforts, multi-language notices, and improved procurement of translation services. We also improved program data collection by including race and ethnicity data in the EAB process. We encourage customers to provide their race and ethnicity when completing applications for new or replacement Social Security Number (SSN) cards by creating and displaying posters in all field offices and card centers.

Refer to our website for racial equity research, statistics, and data resources.

Strategy: Increase support services for unrepresented claimants

We are committed to evaluating and improving our internal processes to increase equitable service to unrepresented claimants in the disability application process.

Ensure Equity and Improve Outreach: We supported unrepresented claimants at the hearings level during our administrative review process, by helping claimants prepare for their hearing. We assessed our processes and procedures for potential actions that may result in disparate outcomes for unrepresented individuals. We provided a variety of hearing options, including in-person hearings, traditional video hearings, online video hearings, and hearings by telephone. We also engaged claimant representatives and disability advocacy communities to help us examine the impact of internal processes, polices, and service delivery systems on allowance and award outcomes, and how these vary between represented and unrepresented claimants in the hearings process.

Strategy: Conduct implicit bias training for employees

We released agency-wide DEIA training for our adjudicators. This training is available to all employees and aligns with our commitment to promote a fair and unbiased adjudication process in support of EO 14035, *DEIA in the Federal Workforce*. To date, nearly 23,000 employees, including non-adjudicators, have completed the training.

Strategy: Conduct and analyze customer satisfaction surveys to identify areas for improvement

Our Voice of Customer architecture collects customer feedback to help us better understand customer perceptions, needs, and preferences. We infused a focus on customer experience (CX) into agency initiatives through our SecurityStat program, ensuring that customer feedback remains at the center of agency change. We launched a public-facing SecurityStat website to track the agency's progress toward achieving top customer service goals.

Enterprise Voice of Customer (VoC) Feedback Collection: Our VoC feedback collection tool utilizes surveys to capture real-time customer feedback across service channels, including feedback for our three high impact service provider (HISP) priority service designations: (a) applying for adult disability benefits, (b) applying for Social Security retirement benefits, and (c) applying for a replacement Social Security Number card. Direct survey feedback helps us identify pain points along customers' journeys. We revised our survey collection tools in February 2024 to comply with new requirements of measuring touchpoint and transactional performance in accordance with OMB Circular No. A-11 Section 280.14.

We also integrated CX management disciplines throughout the agency, such as customer research, measurement, understanding, customer journey mapping, human-centered design, and customer-centric culture.

We developed and implemented human-centered design solutions to address customer pain points identified in the VoC feedback and during journey mapping exercises. These solutions include reminder calls for appointments and obtaining alternate contact information from customers to allow us to reach them more easily. We are also sending updated disability starter kits to applicants who schedule an appointment, and we launched an English and Spanish "how to" video to help customers prepare for their interviews. In FY 2024, we launched the Customer Experience Business Process Pilot and implemented all 4 of the targeted solutions in 18 field offices. On August 1, 2024, we awarded a contract for conducting research on the effectiveness of the tools used during the pilot project. The results will inform future changes to the tools we use to improve the customer experience.

Visit Performance.gov for more information about our CX goals, progress, and results.

Performance Measures[6]

1.1a: Redesign SSA's website to enhance the user's online experience

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Completed the content audit for the full informational site, completed the new information architecture and design, and completed the retirement path updates	Implemented a *beta* site for SSA.gov; and achieved a two-point increase in customer satisfaction with the redesigned home page	Implemented official website release in December 2022 (FY 2023)	Increased Website Customer Satisfaction Score (CSAT) by 46.8%	Achieve a 1% increase in satisfaction for customers using SSA's website over FY 2023 results (target CSAT 71.0%)	Achieved SSA website CSAT score of 80.7% (9.7% points above the target)

FY 2024 Performance Results

Target Met: We exceeded our goal for FY 2024 by increasing our customer satisfaction score for using SSA's website to 80.7 percent, which was 9.7 percentage points over our FY 2024 target.

1.1b: Collect Customer Feedback

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

FY 2024 Performance Results

Target Met: We established baseline customer experience scores (on trust from the interaction) for each of our three high impact service provider (HISP) service designations, and reported it on https://www.performance.gov/cx/data/: 74.8 percent for applying for Social Security adult disability benefits, 91.3 percent for applying for Social Security retirement benefits, and 89.5 percent for applying for a replacement Social Security Number card.

[6] Results are reported for performance measures when data are available. "Not available" is shown when historical data are not available.

Strategic Objective 1.2: Expand Digital Services*

Leads: Deputy Commissioner for Operations and Chief Information Officer

Strategies:

Better understand our customers' service preferences

Address our customers' service needs

Increase the use of secure digital services

*Noteworthy Progress

FY 2024 Performance Measure Target and Results (see details)		
1.2a: Increase the number of successfully completed online transactions	Increase the number of successfully completed online transactions by 5 million over the prior year (406 million)	**Met**

What Did We Accomplish in FY 2024?

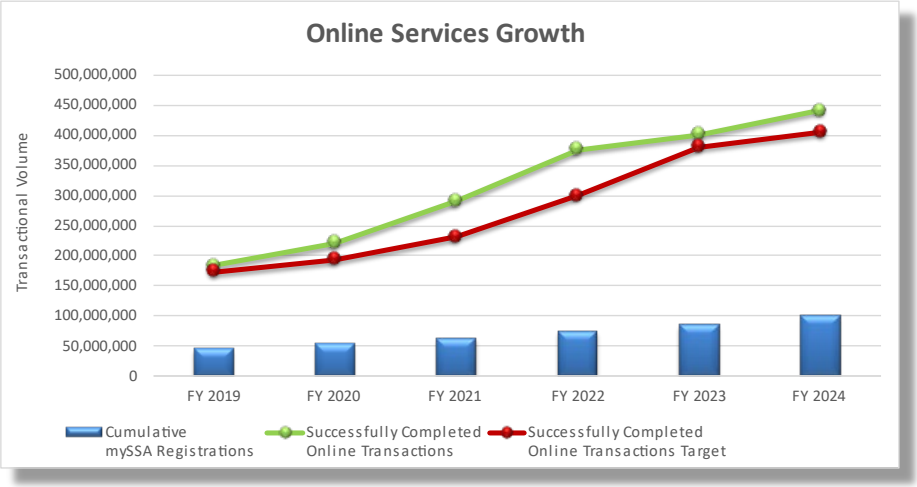
We made noteworthy progress with this strategic objective by completing expansion of *Upload Documents* and the Enterprise Scheduling System.

- Completed nationwide expansion of *Upload Documents* to all field offices and workload support units. *Upload Documents* expanded to 50 agency forms and 79 evidence types, for electronic signature and submission.
- Completed expansion of the Enterprise Scheduling System (ESS) to offer convenient enumeration self-scheduling options to our customers nationwide, who successfully complete an online Social Security Number application for an original or replacement Social Security Card.
- Expanded My1099/1042S benefit statement, allowing beneficiaries to view, print, or save statements for the past six years.
- Implemented overpayment corrections enhancement that provides accurate overpayment information to customers reviewing their benefit and payment information online.
- Implemented change of address for foreign customers, allowing customers living abroad to update their address.
- Completed cognitive testing on the Spanish language Social Security Statement and Supplemental Fact Sheets.
- Expanded the use of video appointments, allowing technicians to process the same work over video that was traditionally completed by telephone.
- Launched new Disability content on SSA.gov. As of the second quarter FY 2024, over 2.8 million users visited the Disability section. Seventy-eight percent of visitors who took our feedback survey rated the new content as helpful.
- Prepared an expansion to the iClaim application by developing an intuitive way for customers to complete an iSSI claim, which simplifies the SSI application process.
- Automated the process for updating citizenship status, while issuing replacement SSN cards for newly naturalized individuals via our Enumeration Beyond Entry process with the Department of Homeland Security.

Strategy: Better understand our customers' service preferences

We marketed our customer feedback collection tools across all major service channels (i.e., online, National 800 Number, and field offices) to understand customers' perceptions, needs, and preferences.

Enhance *my* Social Security: Our online *my* Social Security portal offers a broad range of services, including changing an address or direct deposit information, getting personal retirement benefit estimates, and requesting a replacement SSN card. We moved Upload Documents (formerly eSubmit) behind *my* Social Security and enhanced the claims status tracker.



Modernize the Social Security Statement: The Social Security Statement provides personalized information for each individual. The modernized Statement provides users with their earnings records, Social Security and Medicare taxes paid, and future benefit estimates. The Statement also includes targeted supplemental fact sheets and links to retirement planning tools, calculators, and other applicable information. We completed cognitive testing on the Spanish language Social Security Statement and Supplemental Fact Sheets.

Strategy: Address our customers' service needs

Expand Video Service Delivery (VSD): VSD provides options for the public to conduct transactions by video with our employees. We expanded the use of video appointments, allowing technicians to process the same work over video that was traditionally completed by telephone. We began accepting additional types of evidence via video and made changes to SSA's appointment management system to improve video interview scheduling. We worked with the Department of Homeland Security on an agreement to test video services to issue non-U.S. citizen replacement SSN cards and released technician instructions on how to process these applications in April 2024.

Enhance Online Appeals: The online Non-Medical Appeal (iAppeals) application allows people to request an appeal if they were denied for a reason that is not disability related, such as income, resources, overpayments, and living arrangements. We also updated the my Claims Status Tracker, to display the claimant's chosen hearing method (e.g., in-person, phone, video teleconference, or online video).

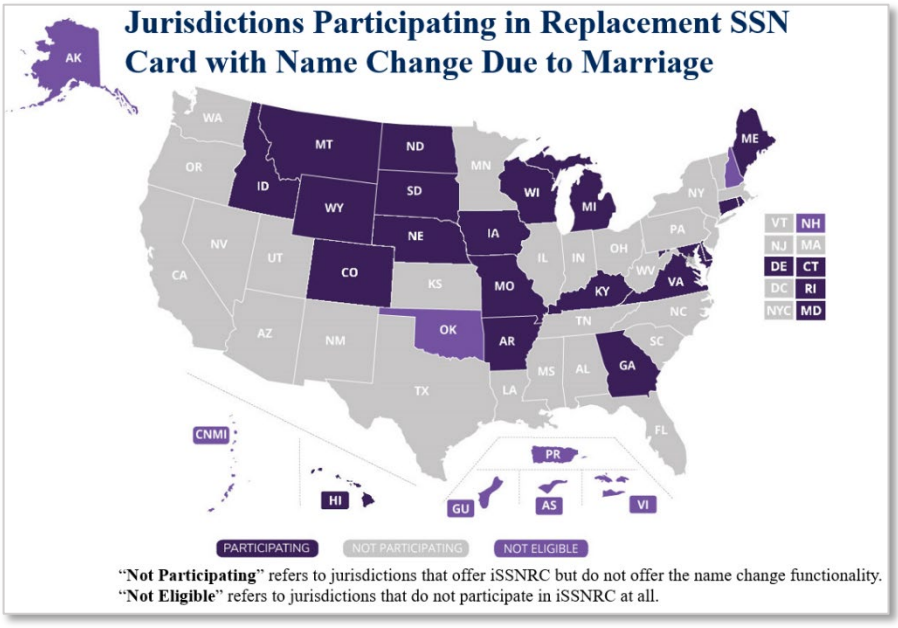
Enhance Enterprise Scheduling System: The Enterprise Scheduling System (ESS) is an interactive scheduling application used by customers and field office employees, to schedule appointments online for both original and replacement Social Security cards, as well as appointments for customers without an SSN. Customers that completed an online application for a Social Security Card can now self-schedule an appointment to bring their documents into an office. Employees can use ESS to assist customers with modifying, rescheduling, or canceling these appointments. We expanded ESS to offer enumeration self-scheduling to customers in all 50 States, the District of Columbia (DC), and 5 U.S. territories.

Strategy: Increase the use of secure digital services

We provide the public with secure, online, remote self-service options.

Enhance the Digital Experience: We continually explore ways to enhance the customer experience by providing convenient, user-friendly, and secure digital self-service options. *Upload Documents* is a service that allows users to electronically upload specific forms, documents, or evidence associated with their transaction, without the need to travel to a field office or mail or fax paper documentation. We completed a nationwide expansion of *Upload Documents* to all field offices and workload support units. We connected *Upload Documents* to *my* Social Security, providing customers an additional way to upload forms and evidence. We also added text messaging as an additional option to receive a notification and link to upload forms and evidence and made it easier for customers to create accounts while maintaining privacy and security. We completed risk assessments on 57 forms for consideration of the signature requirement removal, completed the approval process to remove the signature requirement from 43 forms and completed the updates to 12 forms to remove the signature requirement.

Expand Online Options for Replacement SSN Cards: Currently, customers can request a no-change replacement SSN card in 47 States and Washington, DC. We expanded Internet Social Security Number Replacement (iSSNRC) name change due to marriage to 12 additional States, for a total of 21 participating States.



Performance Measures

1.2a: Increase the number of successfully completed online transactions

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY2023 Results	FY 2024 Target	FY 2024 Results
221 million	290 million	376 million	401.5 million	Increase the number of successfully completed online transactions by 5 million over the prior year (406 million)	441 million

FY 2024 Performance Results

Target Met: We exceeded our FY 2024 target of 406 million online transactions, completing about 39.6 million more transactions than FY 2023.

Strategic Objective 1.3: Build a Customer-Focused Organization*

Leads: Deputy Commissioner for Operations, Deputy Commissioner for Hearings Operations, and Chief Information Officer

Strategies:

Continue modernizing our information technology

Improve timeliness and eliminate and prevent backlogs

*Focus Area for Improvement

FY 2024 Performance Measure Target and Results (see details)		
1.3a: Provide uninterrupted access to our systems during scheduled times of operations	99.90% availability	**Not Met**
1.3b: Modernize evidence acquisition systems to drive increased electronic medical evidence volumes through a multi-channel strategy	Acquire 57% of electronic medical evidence	**Met**
1.3c: Improve customer service by addressing the number of actions pending at the processing centers	5.05 million	**Not Met**

What Did We Accomplish in FY 2024?

Addressing initial disability decision wait times and improving National 800 Number services are our focus areas for improvement.

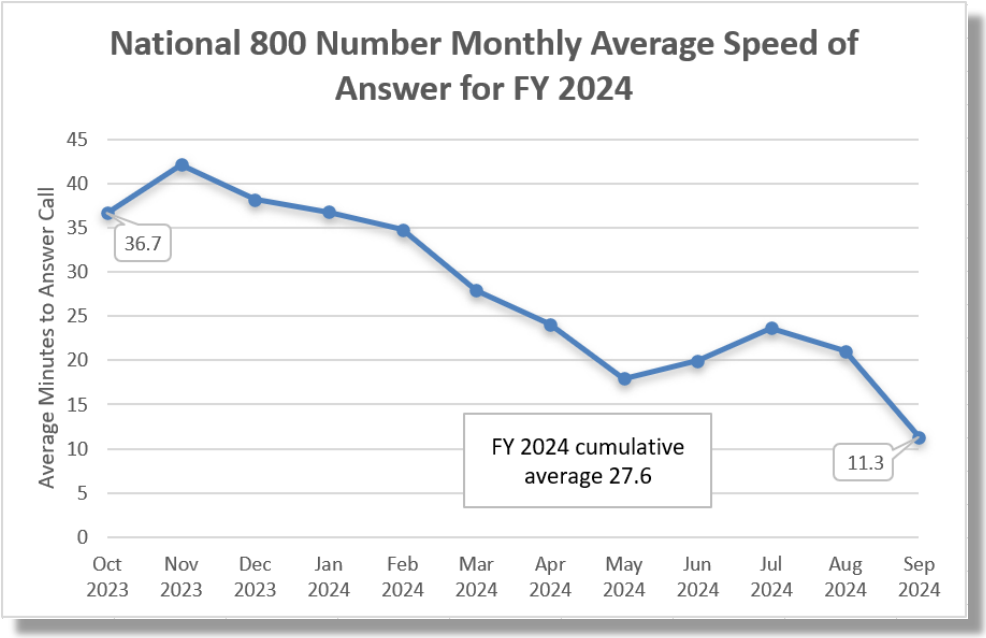
- Reduced our hearings pending below 262,000 to the lowest level in 25 years.
- Reduced the disability claims past work requirement from 15 years to 5 years. This change streamlines the disability application process.
- Received recognition for building a customer-focused culture with a Service to the Citizen Award.
- Implemented systems changes to support several disability policy initiatives aimed at streamlining the disability adjudication process.
- Developed a new report to allow Attorney Representatives (AR) to check their pending cases to ensure they are associated with the claimant as the representative of record, eliminating the need for ARs to call our field, hearing, or State DDS offices for status.
- Fully transitioned to Amazon Web Services/Amazon Connect, which improves our customers' ability to speak with available agents.
- Maintained a zero percent busy rate on the National 800 Number November 2023–September 2024 and reduced our average speed of answer each month from December 2023 through September 2024, which improves the caller experience.
- Reinstated Estimated Wait Time (EWT) to improve the caller experience on the National 800 Number.
- Enacted a redesigned new hire training curriculum at the National 800 Number with job simulations, interactive scenarios, and additional call taking earlier in the training process.
- Restored a pre-2018 policy, that allows technicians in local field offices to apply a prior determination of disability, eliminating the need for beneficiaries to provide updated medical documentation for subsequent claims.

Strategy: Continue modernizing our information technology

We are committed to modernizing and integrating technology solutions to provide accurate, current, easily accessible information and services for our customers and employees agency-wide.

Modernize Information Technology (IT): We created a Digital Modernization Strategy anchored by previous IT modernization efforts to improve our business processes and polices and enrich our culture. We conducted digital identity risk assessments for public facing applications and provided digital services at acceptable assurance levels. We modernized back-end systems, which transformed our customer facing services. For example, we implemented an automated Medicare process for back-end processing of online Medicare claims, which freed up our employees to work on other critical tasks.

Improve 800 Number Services: Millions of our customers count on the convenience and accessibility of our National 800 Number. One of our top priorities is to address the long wait times that our customers experience to speak with an agent. We reduced our average speed of answer by 8.2 minutes, down from 35.8 minutes at the end of FY 2023 to a cumulative average speed of answer of 27.6 minutes by the end of the fiscal year. We used a variety of strategies to reduce customer hold times, including re-routing calls to other available agents, offering a Call Back Assist option to callers, and shortening the message customers first hear when they call us. We also deployed a new Frequently Asked Questions section in the Contact Center as a Service Interactive Voice Response to inform the public of the amount of time a disability decision takes to complete.

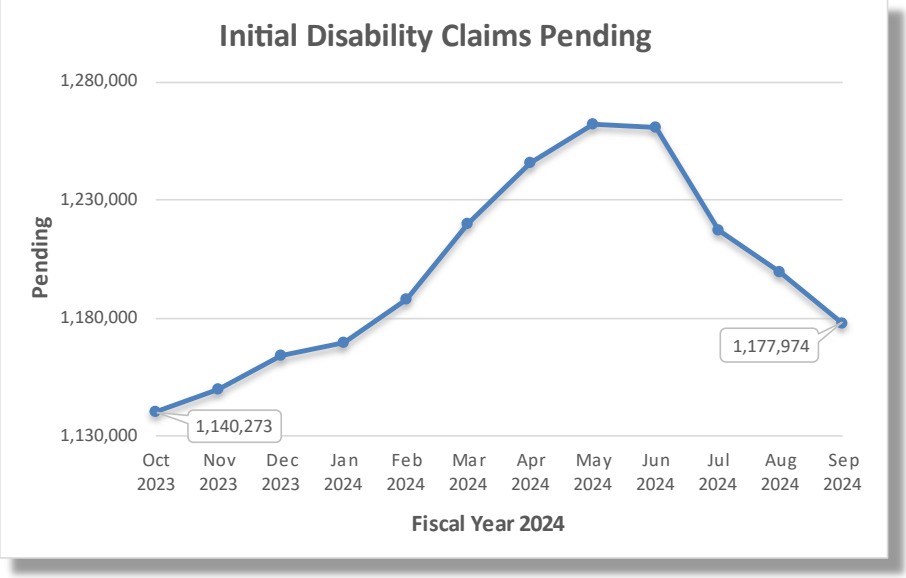


Strategy: Improve timeliness and eliminate and prevent backlogs

We are committed to addressing our growing backlogs and improving service to the public. We share claimants' frustrations with unacceptable wait times.

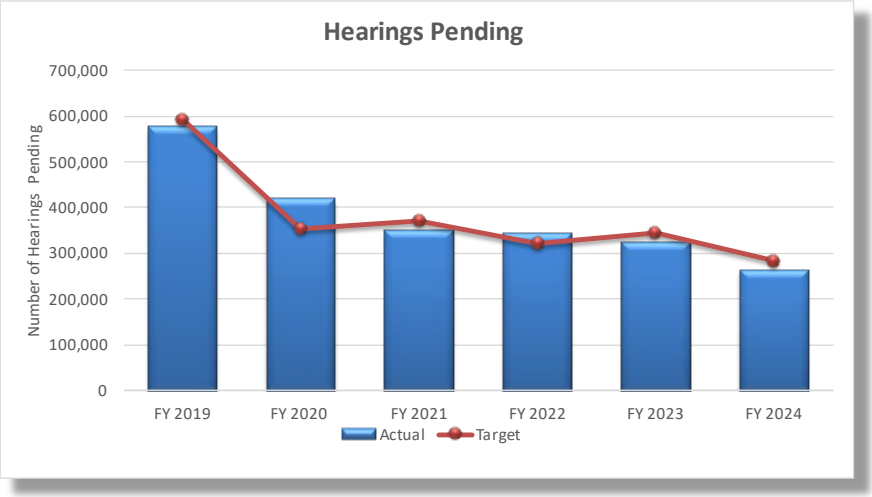
Address Initial Disability Decision Wait Times: One of our top priorities is to improve the national average processing time for initial disability claims and reduce the number of older cases, even as our receipts are projected to increase. We focused on reducing processing time and prioritizing claims

from individuals who have waited the longest for a disability decision. We substantially increased the use of the Intelligent Medical Analysis Generation (IMAGEN) tool from about 21 percent at the end of FY 2023 to 57 percent at the end of FY 2024. IMAGEN is a tool which allows disability examiners to review medical evidence more quickly and accurately using artificial intelligence decision support. We updated third party internet disability application notice language to reflect accurate time estimates for disability decisions. To mitigate any further increases in processing time and prioritize decisions for aged claims, we instituted cadres of SSA employees to support State DDSs by processing their cases. Our APG focused on improving the wait time for an initial disability decision demonstrates our commitment in this area.



Enhance Disability Case Processing: We successfully integrated independent disability case processing systems at the hearing and appellate levels into one modernized case processing system, eliminating silos in technology, and improving the disability case processing throughout our enterprise. We developed a short-term solution for providing disability claim status to appointed representatives at the initial and reconsideration levels. By enhancing the Electronic Records Express Appointed Representative Services status reports, we significantly reduced the need for appointed representatives to call or recontact our field, hearing, or State DDS offices for status updates.

Reduce the Hearings Backlog: Our hearings pending is at the lowest level in 25 years. Our progress stemmed from implementing improvements to the hearings business process, modernizing our IT infrastructure, implementing important policy changes, and rallying our workforce to improve our ability to serve the public. We looked for opportunities to make the hearings and appeals process more efficient while ensuring that we issued quality decisions. We also looked for ways to streamline our processes,



eliminate duplication of efforts, and efficiently use our limited resources to provide better and faster service to the public. Focusing on business process efficiencies proved to be a key driver throughout our overall ability to improve service to the public. In FY 2024, the annual average time to receive a hearings decision was 342 days, exceeding our goal of 345 days.

Expand Access to Electronic Medical Evidence: We offer medical providers multiple electronic options to submit evidence via our automated Health IT (HIT) program, Electronic Records Express web portal, web services, and secure file transfer. We onboarded partners through our connections with large data exchange companies to increase the submission of electronic medical evidence. We have onboarded 24 new HIT partners. The total number of facilities sending records via HIT has grown by almost 10 percent for a total of 255 HIT partners.

Address the PC Backlog: Our PCs process highly complex cases that require manual handling. We are using Robotic Process Automation (RPA) software to automate high volume, labor-intensive, or repeatable tasks, allowing employees to focus their efforts on more complex actions. We expanded our focus to process the oldest pending actions across all workloads and share workloads across our eight PCs to engage all available processing capacity.

Performance Measures

1.3a: Provide uninterrupted access to our systems during scheduled times of operations

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
99.84% availability	99.89% availability	99.96% availability	99.95% availability	99.90% availability	99.83% availability

FY 2024 Performance Results

Target Not Met: We experienced two major disruptions to our systems availability in the 4th quarter of FY 2024. On July 19, the global CrowdStrike outage impacted critical network connectivity infrastructure. On September 6, we suffered a hardware failure of our largest production storage system, which made our Production Processing Facility unusable during business hours. Both disruptions were resolved as quickly as possible, which included actions to prevent and reduce down time should either of these events, or a similar event, occur in the future.

1.3b: Modernize evidence acquisition systems to drive increased electronic medical evidence volumes through a multi-channel strategy

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Acquired 52% of electronic medical evidence	Acquired 53% of electronic medical evidence	Acquired 55% of electronic medical evidence	Acquired 55% of electronic medical evidence	Acquire 57% of electronic medical evidence	Acquired 58% of electronic medical evidence

FY 2024 Performance Results

Target Met: The final percentage of electronic evidence for FY 2024 was 58 percent, exceeding the goal of 57 percent. New HIT partners and Electronic Records Express accounts can be credited for exceeding the goal.

1.3c: Improve customer service by addressing the number of actions pending at the processing centers

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
3.75 million	3.86 million	4.2 million	4.56 million	5.05 million	5.13 million

FY 2024 Performance Results

Target Not Met: The processing centers received more actions than anticipated, and there were fewer hours of overtime available compared to FY 2023. We are planning additional automation to reduce the number of new actions in the processing centers.

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

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

Leads: Deputy Commissioner for Human Resources and Deputy Commissioner for Civil Rights and Equal Opportunity

Strategies:

Conduct analyses to identify and address any systemic barriers present in hiring and advancement

Broaden reach for hiring and promote retention

FY 2024 Performance Measure Target and Results (see details)		
2.1a: Increase the use of workforce data analyses to support strategic workforce planning and decision making	Release four new workforce planning and analysis resources	**Met**

What Did We Accomplish in FY 2024?

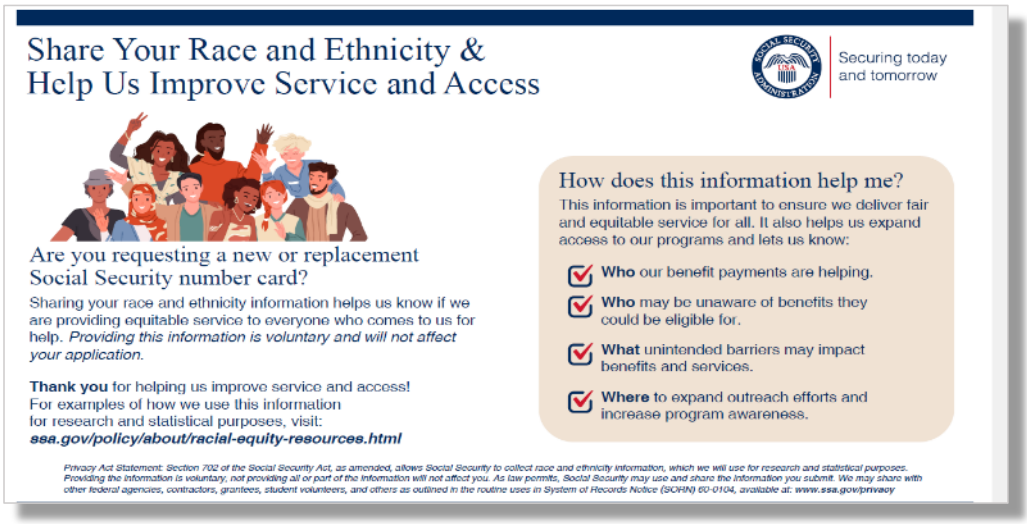
- Created and published internal agency-wide Strategic Workforce Planning (SWP) resources to support both employees and managers.
- Developed internal component-level Strategic Workforce Plans. These plans illustrate our commitment of resources to support our employees and include strategies to address the current and future needs of the workforce.
- Launched an internal Civil Rights and Diversity Empowerment Portal, a consolidated equal opportunity training site for non-managers, managers, and equal employment opportunity (EEO) practitioners.
- Enhanced our digital recruitment efforts by leveraging various online platforms to connect with candidates from universities, including Hispanic Serving Institutions, Historically Black Colleges and Universities (HBCU), Minority Serving Institutions, and military installations.
- Conducted 90 Work-Life Workshops, reaching 6,886 participants.
- Released an Employee Recognition Toolkit to promote a culture of appreciation in our workforce through shared best practices for employee recognition.
- Provided guidance and support to Senior Executive Service (SES) Candidate Development Program (CDP) Class Nine graduates, as they begin the process of obtaining Office of Personnel Management (OPM) certification.
- Hosted mentor events for 5,921 employees to foster relationships that enhance personal and professional growth and development.
- Trained over 1,900 managers on reasonable accommodations through live, virtual sessions.
- Developed "Diversity, Equity, Inclusion, and Accessibility with a Focus on the A," which provided an overview of available services for individuals with disabilities.
- Increased the Federal Employee Viewpoint Survey (FEVS) response rate by 24 percentage points, collecting the highest number of responses from our employees since the FEVS became a census.

Strategy: Conduct analyses to identify and address any systemic barriers present in hiring and advancement

Our Human Resources SecurityStat sessions, allow us to stay abreast of our evolving workforce dynamics and challenges. One of our focus areas is workforce acquisition and attrition, which includes tracking monthly staffing trends, separation trends, and our new-hire retention rates. We analyze many indicators bi-weekly, including one year new-hire retention, resignations, time on onboarding, and separations. This information helps to inform workforce planning, talent management, employee engagement, and continuous improvement.

Enhance Strategic Workforce Planning (SWP): SWP is a holistic concept that integrates workforce analysis and planning, human resource (HR) management, and capability development to strengthen organizational success by aligning the workforce to both current and future service demands. We coordinated enterprise-wide efforts to develop component specific strategic workforce plans. In FY 2024, we updated two Mission Critical Occupations (MCO) technical competency models. The MCOs support the development and administration of the technical competency assessments for our Human Resource Management and Contracting occupations. In FY 2024, technical competency models and technical assessments for both MCOs were completed. Results from the competency assessment analyses will be used to develop targeted training and development plans for current and future staffing needs within these two MCOs.

Promote DEIA: Our goal is to improve policies and practices to ensure a representative workforce and maintain compliance with the laws and regulations related to Section 501 of the Rehabilitation Act of 1973, which prohibits discrimination against people with disabilities in Federal Government employment and the *Architectural Barriers Act* Accessibility Standards. As part of the agency's annual Barrier Analysis Program, we completed the annual Management Directive 715 (MD-715) Report where the agency identified applicable triggers and barriers to equal employment regardless of race, ethnicity, sex, or disability status and submitted the report to Equal Employment Opportunity Commission. We also released an agency-wide Human Resources Internal Communications to announce Inclusive Restroom Signage, promoting inclusivity and equity by



making single-use restrooms available in headquarters buildings in support of the agency's sexual orientation and gender identity policy and expression.

Strategy: Broaden reach for hiring and promote retention

Increasing workplace flexibility allows us to broaden our geographic reach for hiring and retention in a way that complements our efforts to promote diversity and equity in hiring and advancement.

Expand Recruitment Efforts: We are committed to cultivating early career talent and establishing a strong pipeline for our mission critical occupations. Our efforts included expanding our manager recruitment capabilities and increasing internship opportunities. We expanded our digital recruitment significantly by using online platforms to reach potential intern and job candidates. Our Careers with SSA web page improvements resulted in an exponential increase in our page views. In FY 2024, we received 1,477,781 total views compared to 80,469 total views in FY 2023. Over 90 percent of colleges and universities use an online platform to advertise internships and permanent job opportunities to their students; therefore, our use of these tools allows us to get our hiring opportunities to a much larger audience of college and university job seekers.

Foster Employee Retention: We are committed to retaining new hire employees and increasing employee retention by prioritizing their well-being. We implemented a time-off awards program to help improve employee morale, work/life balance, and recognize exemplary work or accomplishments. We leveraged both new hire and exit survey data to strengthen our data-driven approach to hiring and retention. Utilizing advanced statistical analysis, we identified key factors influencing new hire retention. We analyzed exit survey results to pinpoint opportunity areas and top reasons employees leave including trends over lengths of service and satisfaction levels.

We also revised our new hire and exit surveys to meet customer needs and enhance data-driven decision-making capabilities, agency-wide. The updated new hire survey provides a more comprehensive perspective of the new hire experience and a better measure of employee perceptions throughout the employee lifecycle to help us improve retention. Specifically, the new approach utilizes two surveys administered at each new hire's 90-day and 9-month mark, as opposed to one survey administered to all employees hired in the prior fiscal year. The updated exit survey provides more focused insight into why employees are leaving and what they plan to do after leaving SSA. In addition, the updated survey contains questions on employee motivations, workplace rapport, telework arrangements, work environment and culture, job expectations, compensation, recognition, and overall satisfaction.

Execute Talent Management and Succession Planning: We provide our executives with ongoing virtual training opportunities that align with the Executive Core Qualifications to promote continual learning. We conducted a series of internal meetings with agency senior leadership and the Executive Resource Board to discuss individual development needs of our career SES members and the organization's readiness to fill critical vacancies. Following this meeting, we issued critical feedback

to all Career SES members and confirmed the development and implementation of required Executive Development Plans for all Career SES members.

Performance Measures

2.1a: Increase the use of workforce data analyses to support strategic workforce planning and decision making

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Not available	Not available	Not available	Released four workforce planning and analysis resources	Release four new workforce planning and analysis resources	Released five new workforce planning and analysis resources

FY 2024 Performance Results

Target Met: We released five workforce planning and analysis resources in FY 2024 (i.e., Formulating Goals, Objectives, & Strategies; Developing Metrics & Measures Guide; Knowledge Sharing Tool; Stay Interview Guide; and Transition Planning & Exit Activities Guide).

Strategic Objective 2.2: Support Employees' Chosen Career Paths

Lead: Deputy Commissioner for Human Resources

Strategies:

Invest in our employees

Ensure inclusive leadership development

FY 2024 Performance Measure Target and Results (see details)		
2.2a: Improve employee engagement	Achieve a score of 75 on the Employee Engagement Index (Supervisor Subindex)	**Met**
2.2b: Ensure new supervisors receive timely leadership training	At least 95% of new supervisors complete training within one year of the effective date of their supervisory appointment	**Met**
2.2c: Strengthen manager accountability for effective performance management	Track 96% of performance documents through e7B[7]	**Met**

What Did We Accomplish in FY 2024?

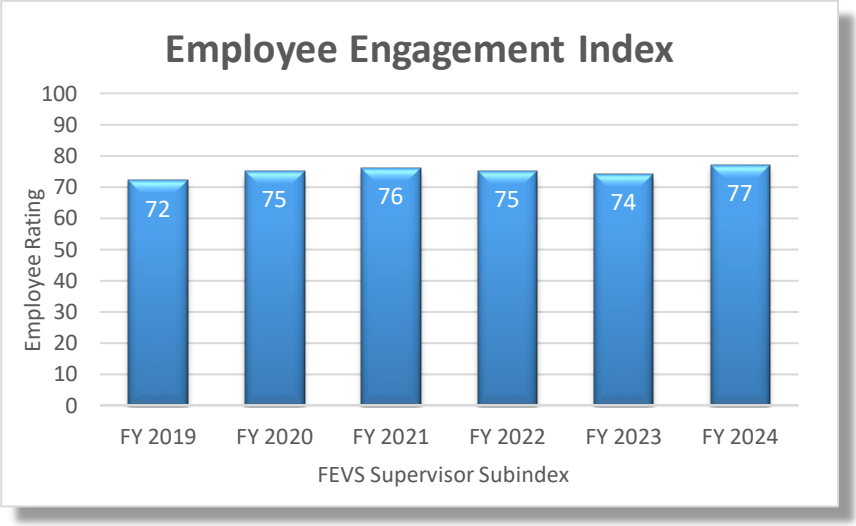
- Implemented agency and component level FYs 2024-2025 Improving Workplace Morale (IWM) plans. These plans are roadmaps for improvement in the areas of effective leadership, employee and manager development, effective communication, and DEIA.
- Launched the *Invest in You!* website. This website gives employees access to information about employee wellness, career development, professional development, management support, and chosen career paths.
- Updated the Lessons in Leadership video series. These short videos featuring our leaders, are targeted at managers in all leadership positions to increase employee engagement throughout the agency.
- Sponsored a virtual wellness fair for Mental Health Awareness Month, which included various experts from national mental health organizations.
- Implemented a comprehensive communication and marketing plan to announce the National Leadership Development Program (NLDP).
- Conducted a new feedback survey for SES CDP Class Nine. The results of this survey led to recommendations to the Executive Resources Board to include program modifications and an assessment for Class 10.
- Achieved a 34-percentage point increase in post-training knowledge scores compared to pre-training scores across the Labor and Employee Relations (LER) training sessions.
- Launched the Percipio library of courses, available through weLearn with lessons for leadership, career, and personal growth.

[7] Electronic 7B File (e7B) is an online application that serves as the centralized repository for personnel records maintained by supervisors.

Strategy: Invest in our employees

We acknowledge our employees' abilities and encourage them to pursue their chosen career paths by fostering an engaging workplace environment and by providing training and development opportunities. 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.

Improve Employee Engagement: We are committed to improving employee engagement. We assigned a senior advisor to spearhead our Employee Experience initiatives, including an agency-level approach to improving employee engagement that aims to enhance employee satisfaction, retention, and overall well-being. We released an Employee Recognition Toolkit to promote a culture of appreciation in our workforce through shared best practices for employee recognition. We launched an Employee Engagement Community of Practice (EECoP) comprised of managers, engagement practitioners, and other agency stakeholders. The goal of the EECoP is to promote the exchange of ideas between employees and managers to support the agency's efforts to improve morale.



Strengthen the Performance Management Process: Our future depends on developing employees' leadership and management skills throughout their careers. Identifying and reducing skill gaps is important for our success. We are equipping managers with the necessary tools to address potential and current performance and conduct matters through Labor Employee Relations (LER) training. Participants can assess their knowledge growth by comparing pre and post training scores. Across all LER training sessions, we achieved our goal of an average 85 percent post-training knowledge score and demonstrated a 34 percentage point increase in post-training knowledge scores compared to pre-training scores across the LER training sessions. Participants also have access to online resources, and training materials, for future reference. We are building a cadre of leaders whose skills are transferable throughout our organization.

Strategy: Ensure inclusive leadership development

We will invest in our future leaders by developing job-enrichment opportunities to facilitate the transfer of job knowledge from employees eligible for retirement to less experienced employees.

Invest in Training and Support for Managers: We promote an inclusive and engaged workforce, and support employees from all backgrounds fully participating in support of our mission. It is imperative that our supervisors and managers are properly trained and supported. Research reflects that the direct supervisor-employee relationship has a substantial effect on employee engagement and satisfaction. We provided our supervisors and managers with the tools and resources they need to enhance their skills and competencies, optimize organizational performance, and address current and future workforce needs. We offered hiring authority refresher training to all managers to ensure they effectively use all available hiring authorities. We promoted our Leadership Fundamentals (LF), a multi-year online and self-paced curriculum that provides sequential training for managers within the first five years of their supervisory roles. We launched the Years 3–5 curriculum with an enrollment of over 967 supervisors. The curriculum includes personnel management, labor and employee relations, diversity in the workplace, performance management, and health and safety training. We hosted a 90-minute live virtual training on servant leadership attended by members of the SES. We also provided quarterly training and development opportunities to the SES related to Building Trust, Psychological Safety, and Servant Leadership.

Ensure Equity in Leadership Development: We continually recruit from underrepresented groups to expand and diversify our applicant pools in leadership development programs. Our National Leadership Development Program (NLDP) is comprised of three tiers to develop leaders at all levels: Aspiring Leadership for GS-8 through GS-11, Mid-Level Leadership for GS-12 through GS-14, and Executive Leadership for GS-15 employees. To ensure a fair and equitable selection process, we have partnered with OPM's USA Hire, to design and administer three online assessments for the NLDP application. We also partnered with several stakeholders to host 13 marketing events to promote the FYs 2024–2026 NLDP. In FY 2024, we announced NLDP Track 3, Aspiring Leaders. Over 1,000 competitive and excepted service employees applied for the program.

Performance Measures

2.2a: Improve employee engagement

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Achieved a score of 75 on the Employee Engagement Index (Supervisor subindex)	Achieved a score of 76 on the Employee Engagement Index (Supervisor subindex)	Achieved a score of 75 on the Employee Engagement Index (Supervisor subindex)	Achieved a score of 74 on the Supervisor subindex	Achieve a score of 75 on the Employee Engagement Index (Supervisor subindex)	Achieved a score of 77 on the Employee Engagement (Supervisor subindex)

FY 2024 Performance Results

Target Met: We achieved a score of 77 on the Employee Engagement Index (Supervisor subindex), exceeding our target.

2.2b: Ensure new supervisors receive timely leadership training

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

FY 2024 Performance Results

Target Met: Ninety-six percent (474 of 494) of supervisors appointed in FY 2023 completed training within one year.

2.2c: Strengthen manager accountability for effective performance management

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Tracked 96.5% of Employee acknowledgements through e7B	Tracked 98% of Employee acknowledgements through e7B	Tracked 96.3% of Employee acknowledgements through e7B	Tracked 96% of performance documents through e7B	Track 96% of performance documents through e7B	Tracked 96% of performance documents through e7B

FY 2024 Performance Results

Target Met: We tracked 96 percent of performance documents through e7B.

Strategic Goal 3: Ensure Stewardship of SSA Programs

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

Leads: Deputy Commissioner for Analytics, Review, and Oversight and Chief Information Officer

Strategies:

Support our cost-effective program integrity work to safeguard benefit programs to better serve our recipients

Enhance our payment accuracy efforts, including overpayments and underpayments

Expand the use of data analytics and predictive modeling

Strengthen our cybersecurity program

FY 2024 Performance Measure Target and Results (see details)		
3.1a: Improve the integrity of the SSI Program by focusing our efforts on reducing overpayments	94.00% (O/P)	**Result Available Summer 2025**
3.1b: Maintain a high payment accuracy rate by reducing overpayments, in the Old-Age, Survivors, and Disability Insurance Program	99.80% (O/P)	**Result Available Summer 2025**
3.1c: Ensure the quality of our decisions by achieving the State disability determination services decisional accuracy rate for initial disability decisions	97% decisional accuracy	**Met**

What Did We Accomplish in FY 2024?

- Launched two maintenance fraud risk assessments in Administrative Services and eServices.
- Developed and implemented policy to support issuance and completion of role-based training for employees and contractors with significant privacy responsibilities.
- Established a Cyber Security Senior Advisory Committee to ensure cybersecurity and privacy compliance requirements and risk are adequately documented and managed for information systems, applications, and programs.
- Created and released a new SSI Underpayment Case Control Log to help technicians track SSI underpayments requiring peer review.
- Reduced the average representative fee agreement action processing time by 28 percent compared to FY 2023.
- For new *my*Social Security accounts, we transitioned to ID.me, a single sign-on provider that meets the U.S. government's online identity proofing and authentication requirements.
- Launched Overpayments and Underpayments SecurityStat, to accelerate the deployment of customer service improvements.
- Updated overpayment policy, including:
  - Extended the period of which an individual can repay an overpayment from 36 to 60 months without requiring the person to provide proof of their income, resources, or expenses;
  - Revised the OASDI default overpayment recovery rate from 100 percent of the monthly benefit amount (MBA) to the greater of 10 percent of the MBA or $10 per month; and
  - Raised the administrative waiver tolerance threshold from $1,000 to $2,000.

FY 2024 Performance Measure Target and Results		
3.1d: Maintain effective cybersecurity and privacy programs	Achieve 90% on the CIO Federal Information Security Management Act Metrics Scorecard	**Met**

Strategy: Support our cost-effective program integrity work to safeguard benefit programs to better serve our recipients

Dedicated program integrity (PI) funding helps ensure individuals receive the benefits to which they are entitled and helps safeguard the integrity of benefit programs by confirming eligibility, preventing fraud, and improving payment accuracy to prevent overpayments and underpayments. PI funding allows us to conduct SSI redeterminations and continuing disability reviews, manage the anti-fraud cooperative disability investigations program, and support special attorneys for criminal fraud prosecutions.

Modernize our Debt Management: Through this effort, we are working to modernize our systems, data, and business processes to post, track, collect, and report on overpayments more effectively and efficiently. We paused our debt management modernization efforts in FY 2024 and are resuming these efforts in FY 2025.

Strategy: Enhance our payment accuracy efforts, including overpayments and underpayments

We remain focused on improving payment accuracy and preventing fraud. We are committed to mitigating and preventing improper payments by leveraging audit recommendations, implementing automation and business process improvements, and enhancing data analytics. We are continually improving the administration of our programs and identifying and addressing potential inequities. For more information, please refer to our *Agency Financial Report* and *PaymentAccuracy.gov*.

Promote Timely Wage Reporting: Changes in a person's work and wages are a leading cause of improper payments in our disability programs. We are maintaining our mobile wage reporting application, which makes it easier to report wages from mobile devices. We published the Payroll Information Exchange (PIE) notice of proposed rulemaking which is an integral step toward receiving timely and accurate wage data. We also released social media posts on Facebook and Twitter sharing a link to our YouTube video to help beneficiaries learn about the importance of reporting wages and the automated electronic options for wage reporting.

Ensure Timely and Accurate Payments to Claimants and their Appointed Representatives: A fee agreement is a written statement signed by the claimant and the claimant's appointed representative, that details the fee arrangement between the parties**.** When fee agreements are in place, both parties expect timely and accurate payments following a favorable decision. We focused our efforts on releasing approved representative fees within 60 days of receipt.

Strategy: Expand the use of data analytics and predictive modeling

We employ multiple data analytics and predictive modeling technologies in several of our online services, to improve the efficiency and accuracy of our programs and to assist with administrative tasks. As these technologies evolve and expand, we continually search for new opportunities to broaden their use.

We use statistical models to select cases for workloads such as medical CDRs and disability pre-effectuation reviews. We expanded our analytics portfolio to include generative artificial intelligence, a machine learning model. This technology allows us to extract business intelligence from large free-text data sets, predictive modeling to forecast employee attrition, and complex data engineering to gain new insights into SSI workloads.

We are working on a project that utilizes large language model technology to analyze call transcript data from our National 800 Number. We expect the insights from this analysis will help us better understand what motivates customers to call us, so we can improve how we manage call traffic and address customer needs.

Enhance Fraud Prevention and Detection Activities: We improved our use of data analytics and predictive modeling to identify evolving patterns of suspicious activities in our workloads, allowing us to detect and prevent fraud before issuing payments. Through the Fraud, Waste, and Abuse SecurityStat sessions, we identified fraud risks and prioritized activities that will enhance prevention, detection, and enforcement. Part of this work involves developing our risk management strategy and conducting fraud risk assessments and profiles to understand the fraud landscape. We then build on the strategy, assessments, and profile work to develop and refine data analytics and predictive modeling to detect and prevent fraud. We also formed an agency-wide workgroup to develop business requirements that identify the service channel associated with allegations of direct deposit fraud. We also strengthened our digital identity proofing process by updating language on activation code Short Message Service (SMS) messages.

Strategy: Strengthen our cybersecurity and privacy program

We strengthened the resilience of our cybersecurity and privacy programs, which are critical to protecting the Personally Identifiable Information (PII) we store and enabling uninterrupted availability of our network.

Strengthen Our Information Security Program and Privacy Programs and Modernize Our Cybersecurity and Privacy-Enhanced Risk Management Infrastructure: We collaborated with risk principals across the agency and matured and automated our cybersecurity and privacy risk management frameworks. We released a major enhancement to the Allegation Referral Intake System that sends email reminders to employees to complete Office of the Inspector General fraud allegations and alerts. We expanded our existing cybersecurity capabilities in Zero Trust Architecture, Identity, Credentialing and Access Management, and Enterprise Logging in to support EO 14028, *Improving the Nation's Cybersecurity*. We implemented a privacy role-based training policy and curriculum for employees and contractors with significant privacy responsibilities. We also established a dedicated division to identify and respond to suspected and confirmed breaches of PII and made significant updates to the agency's Breach Response Plan.

Performance Measures

3.1a: Improve the integrity of the Supplemental Security Income Program by focusing our efforts on reducing overpayments[8]

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
91.24% (O/P)	92.83% (O/P)	91.98% (O/P)	90.8% (O/P)	94.00% (O/P)	Results available in Summer 2025
FY 2024 Performance Results					
FY 2024 results will be available in summer of 2025.					

3.1b: Maintain a high payment accuracy rate by reducing overpayments, in the Old-Age, Survivors, and Disability Insurance Program[9]

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
99.83% (O/P)	99.83% (O/P)	99.49% (O/P)	99.76% (O/P)	99.80% (O/P)	Results available in Summer 2025
FY 2024 Performance Results					
FY 2024 results will be available in summer of 2025.					

[8] The targets and results represent our annual overpayment (O/P) accuracy rate findings from our stewardship review of non-medical aspects of the SSI program. The O/P accuracy rate is the percentage of all dollars paid that are free of O/P errors. For more information, please refer to paymentaccuracy.gov

[9] The targets and results represent our annual O/P accuracy rate findings from our stewardship review of non-medical aspects of the Old Age, Survivors, and Disability Insurance (OASDI) program. The O/P accuracy rate is the percentage of all dollars paid that are free of O/P errors. For more information, please refer to paymentaccuracy.gov

3.1c: Ensure the quality of our decisions by achieving the State disability determination services decisional accuracy rate for initial disability decisions[10]

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
96% decisional accuracy	97% decisional accuracy	97% decisional accuracy	97.5% decisional accuracy	97% decisional accuracy	97.8% decisional accuracy
FY 2024 Performance Results					
Target Met: We exceeded our FY 2024 target, achieving 97.8 percent decisional accuracy rate for initial disability decisions.					

3.1d: Maintain effective cybersecurity and privacy programs[11]

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Managing Risk score achieved	Managing Risk score achieved	Results not available	Achieved 96% on the CIO FISMA Metrics Scorecard	Achieve 90% on the CIO FISMA Metrics Scorecard	Achieved 98% on the CIO FISMA Metrics Scorecard
FY 2024 Performance Results					
Target Met: We increased the number of certified systems with an Authority to Operate by 4.5 percentage points and increased the number of systems with Multi-Factor Authentication by 3 percentage points. We exceeded the FY 2024 target by 8 percentage points.					

[10] The targets and results represent the percentage of correctly decided cases compared to all sampled cases.

[11] The targets and results represent SSA scores on the CIO Scorecard for Metrics and Weights.

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

Lead: Deputy Commissioner for Budget, Finance, and Management

Strategies:

Identify and work to address potential barriers and bolster open competition in the acquisition and grants process

Disseminate acquisition and grant proposal requests widely to ensure responses from a broad range of organizations

FY 2024 Performance Measure Target and Results (see details)		
3.2a: Achieve Small Business Administration annual scorecard success in contracting with HUBZone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses	Achieve an overall grade of "A" on the Small Business Administration (SBA) scorecard	**Result Available Spring 2025**
3.2b: Increase funding for HBCUs and ISSCs	100% above the 4-year average	**Met**

What Did We Accomplish in FY 2024?

- Conducted monthly outreach meetings with small and large businesses to encourage small business participation in upcoming agency procurements, as well as to promote teaming and opportunities for subcontracting.
- Released the Interventional Cooperative Agreement Program (ICAP) Request for Applications (RFA) as the first simplified Notice of Funding Opportunity (NOFO). The simplified NOFO will assist non-technical staff in smaller colleges in locating potential opportunities. We released the Analyzing Relationships between Disability, Rehabilitation, and Work (ARDRAW) RFA as the second NOFO.
- Worked closely with Small Business Administration (SBA) and National Aeronautics and Space Administration procurement representatives to identify acquisitions conducted using the General Services Administration Federal Supply Schedules that can be set aside for the following small businesses: Historically Underutilized Business (HUB) Zone, Disadvantaged, Women-Owned, Veteran-Owned, and Service Disabled.
- The Retirement and Disability Research Consortium (RDRC) awarded six centers with a 5-year agreement including HBCUs and Institutions Serving Students of Color (ISSC) institutions with scholarship and training totaling funding of $5.7 million.
- Expanded the scope of the RDRC annual meeting by returning it to an in-person event, added a poster session and networking opportunities for junior scholars, expanded training and education funding at HBCU/ISSCs, and revised scoring criteria to broaden the academic and experience factors that are considered in scoring investigator qualifications.
- Expanded and updated lists of contacts at HBCUs and other ISSCs to increase dissemination of Dear Colleague letters that announce funding opportunities such as the ICAP and ARDRAW.

Strategy: Identify and work to address potential barriers and bolster open competition in the acquisition and grants process

We devise best practices to encourage participation by HBCUs and ISSCs and share Federal contracts with qualified HUBZone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses.

Advance Equity in Procurement and Grantmaking: Our goal is to ensure equitable access to contracting and grant opportunities for underrepresented groups and research institutions serving people of color. We revised RDRC funding criteria that focuses on research conducted by HBCUs and ISSCs. The revised criteria provide them with competitive advantages in performing research, including in underserved communities. The goal is to emphasize research on community participation and connections to underserved communities.

Strategy: Disseminate acquisition and grant proposal requests widely to ensure responses from a broad range of organizations

We reached out to 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.

Advance Equity in Procurement: Our Office of Small and Disadvantaged Business Utilization, conducts monthly outreach meetings with our vendor community to engage with them and discuss upcoming contracting opportunities, and help small businesses identify subcontracting opportunities. We expanded training and education funding at HBCUs and ISSCs and revised scoring criteria to broaden the academic and experience that is considered in scoring investigator qualifications.

Performance Measures

3.2a: Achieve Small Business Administration annual scorecard success in contracting with HUBZone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
Achieved an overall grade of "A" on the SBA scorecard	Achieved an overall grade of "A" on the SBA scorecard	Achieved an overall grade of "A" on the SBA scorecard	Achieved an overall grade of "A" on the SBA scorecard	Achieve an overall grade of "A" on the SBA scorecard	Results available Spring 2025
FY 2024 Performance Results					
FY 2024 results will be available in Spring of 2025.					

3.2b: Increase funding for HBCUs and ISSCs[12]

FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Target	FY 2024 Results
$62,686	$550,577	$608,896	100% above the 4-year dollar average	100% above the 4-year dollar average	1,628% above the 4-year dollar average
FY 2024 Performance Results					
Target Met: We issued RDRC grants to HBCU and ISSC institutions and scholars totaling $5.7 million, which was over 1,628 percent of the 4-year dollar average ($350,000).					

[12] The increase in funding is consistent with EO 14041, *White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity Through Historically Black Colleges and Universities*, dated September 3, 2021.

Strategic Objective 3.3: Improve Organizational Performance and Policy Implementation

Leads: Deputy Commissioner for Retirement and Disability Policy and Deputy Commissioner for Budget, Finance, and Management

Strategies:

Simplify our policies and modernize our processes

Strengthen program and resource management

Expand strategic partnerships with external partners

FY 2024 Performance Measure Target and Results (see details)		
3.3a: Reduce our Real Property Footprint	Achieve a 824,000 USF reduction	**Met**

What Did We Accomplish in FY 2024?

- Published the following final rules and notices of proposed rulemaking (NPRM):
  - February 15: Use of Electronic Payroll Data to Improve Program Administration NPRM (89 FR 11773);
  - March 27: Omitted Food From In-Kind Support and Maintenance Calculations Final Rule (89 FR 21199);
  - April 11: Expansion of the Rental Subsidy Policy for Supplemental Security Income Applicants. Recipients Final Rule (89 FR 25507);
  - April 19: Expand the Definition of a Public Assistance Household Final Rule (89 FR 28608);
  - June 22: Intermediate Improvement to the Disability Adjudication Process, Including How We Consider Past Work Final Rule (89 FR 27653).
- Simplified policy on Collateral Estoppel to allow field office technicians to adopt a prior disability determination for a new claim when the beneficiary is receiving disability benefits on another record or title.
- Vacated a large headquarters lease, yielding a 717,000 useable square foot reduction.
- Published Wave 2 Occupational Requirements Survey data with the Bureau of Labor Statistics.
- Improved the Lump Sum Death Payment process by removing many of the questions and evidence requirements for living in the same household determinations.
- Launched Notices SecurityStat to improve notice quality and reduce printing and mailing costs.
- Expanded our internal notice language clearance process to review notices through a customer experience lens.
- Implemented a data exchange to provide State death data to the Department of the Treasury for the Do Not Pay system, in support of the *Consolidated Appropriations Act,* 2021.
- Implemented regulatory updates to the digestive and skin disorders listings in our Listing of Impairments.

Strategy: Simplify our policies and modernize our processes

We continue to update regulatory provisions to reflect advances in medical knowledge and regularly engage internal and external stakeholders to evaluate and update policies.

Publish SSA/Administration Regulatory Priorities to Simplify SSI, Improve the Disability Adjudication Process, and Reduce Improper Payments: We published three final rules to simplify In-Kind Support and Maintenance, as well as an NPRM to reduce wage reporting burdens and improve payment accuracy using electronic payroll data.

Improving the Disability Adjudication Process: We published our Final Rule "Intermediate Improvement to the Disability Adjudication Process: Including How We Consider Past Work" and two policy changes effective on June 22, 2024. The final rule revises the time period that we consider when determining whether an individual's past work is relevant for purposes of making disability determinations and decisions. Specifically, we revised the definition of past relevant work by reducing the relevant work period from 15 years to 5 years. This change will allow individuals to focus on the most current and relevant information about their past work, better reflect the current evidence based on changes over time in worker skill decay and job responsibilities, reduce processing time, improve customer service, and reduce burden on individuals.

Update the Listing of Impairments: The Listing of Impairments describes disabling impairments for each of the major body systems. We use these listings to more quickly identify some claimants as medically disabled, if they meet the definition of one of the impairments already described in the listings. We also consistently review these listings and make targeted updates as necessary, given advances in medical knowledge, emerging research, and stakeholder input.

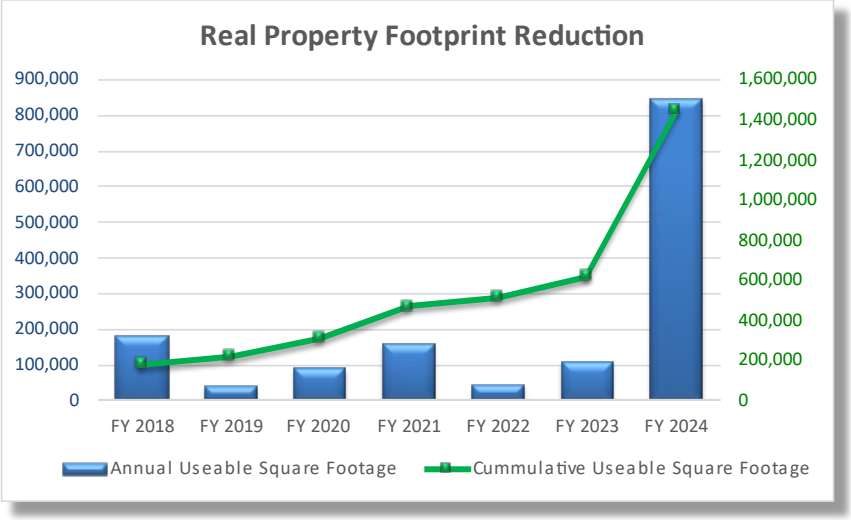
Strategy: Strengthen program and resource management

We leverage data, analyses, and program expertise to manage our organizational challenges and ensure an enterprise approach to deliver our mission.

Organizational Health and Organizational Performance: In accordance with OMB Memorandum M-23-15, *Measuring, Monitoring, and Improving Organizational Health and Organizational Performance in the Context of Evolving Agency Work Environments*, we developed an organizational performance process that both utilizes evidence-based analyses and fosters a culture of continuous improvement. We established SecurityStat, an agency-wide, cross-cutting performance management program, to measure performance and accelerate the deployment of customer service improvements. These bi-weekly sessions cover eight key focus areas, including Human Resources, National 800 Number services, Initial Disability Claims, and Overpayments/Underpayments. We also update our public facing SecurityStat website on a monthly basis, to report progress on our top customer service goals. Using evidence from the SecurityStat sessions and input from managers and employees, we developed the SSA Action Plan for 2024 (Action Plan), a comprehensive operational plan that is driving

tangible actions and propelling us forward to achieving our goals. The Action Plan is the product of thousands of ideas offered by our employees to improve customer service. It contains 27 initiatives accompanied by leading actions and quick wins, a number of which have already been accomplished.

Reduce Our Real Property Footprint: We continually assess the long-term future of agency facilities and our real property portfolio, while fulfilling workspace needs, optimizing space utilization, and achieving cost savings to meet the requirements in OMB Memorandum M-22-14, *FY 2024 Agency-wide Capital Planning to Support the Future of Work*. We are reducing our real property footprint, as we renovate existing buildings and renew lease agreements. We evaluate our real property requirements and pursue savings that we can reinvest to improve service.



Strategy: Expand strategic partnerships with external partners

We partner with other Federal agencies to increase the accuracy of our records, improve the customer experience, and increase organizational effectiveness.

Develop an Occupational Information System: Our disability claims policy and procedures require that we evaluate medical, and in many cases, occupational information. We evaluate occupational information to determine whether a claimant can do their past work or adjust to other work in the national economy. We must reference information about current occupations and requirements to inform our disability decisions. We are working with the Department of Labor's Bureau of Labor Statistics (BLS) to develop the Occupational Requirements Survey, which collects detailed information on occupations in the national economy After an initial three years of data collection (Wave 1), BLS collected additional occupational data for a five-year update cycle (Wave 2). BLS finished data collection for the first year of Wave 3 and published final Wave 2 estimates.

Expand Strategic Partnerships with External Partners: We provide SSN verifications and exchange birth, death, prisoner, and benefit payment information, as permitted under law, with Federal, State, and private partners. We implemented a data exchange to provide State death data to the Department of the Treasury for the Do Not Pay system, in support of Consolidated Appropriations Act, 2021. We also held quarterly Data Exchange Community of Practice meetings to expand our Federal and private sector partnerships.

Performance Measures

3.3a: Reduce our real property footprint

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

FY 2024 Performance Results

Target Met: We exceeded our target of 824,000 USF by reducing our real estate footprint by 846,170 in FY 2024.

Budgeted Workload Measures

Workload Measures	FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Results
Retirement and Survivor Claims (includes Medicare)					
Retirement and Survivor Claims Completed	6,120,255	6,081,969	6,592,620	6,692,914	6,817,639
Disability Claims					
Initial Disability Claims Receipts	2,212,858	2,009,254	2,141,612	2,185,209	2,316,508
Initial Disability Claims Completed	2,037,356	2,011,298	1,882,540	1,973,641	2,229,056
Initial Disability Claims Pending	763,747	739,745	940,886	1,127,881	1,177,974
Average Processing Time for Initial Disability Claims (days)	131 days	165 days	184 days	218 days	231 days
Disability Reconsiderations					
Disability Reconsiderations Receipts	567,800	571,291	542,376	545,937	566,262
Disability Reconsiderations Completed	552,601	515,698	483,217	483,148	514,354
Disability Reconsiderations Pending	143,781	192,892	233,919	289,890	331,574
Average Processing Time for Disability Reconsiderations (days)	122 days	147 days	183 days	213 days	231 days

Workload Measures	FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Result
Hearings					
Hearings Receipts	428,810	382,870	356,666	355,565	362,552
Hearings Completed	585,918	451,046	362,864	377,685	422,797
Hearings Pending	418,313	350,137	343,939	321,819	261,574
Annual Average Processing Time for Hearings Decisions (days)[13]	386 days	326 days	337 days	450 days	342 days
National 800 Number					
National 800 Number Calls Handled[14]	34,480,132	34,499,955[15]	29,511,502	29,535,675	31,801,331
Average Speed of Answer (minutes)	16.1 minutes	13.5 minutes	32.7 minutes	35.8 minutes	27.6 minutes[16]
Agent Busy Rate (percent)	7.4%	0.2%	6.0%	8.3%	0.9%

[13] Average processing time for hearings is an annual figure.

[14] Volumes for FYs 2023–2024 include National 800 Number Calls Handled by automation.

[15] FYs 2021 and 2022 calls handled results were updated retroactively after the close of the fiscal year when the data became available.

[16] SSA fully transitioned to Amazon Web Services (AWS) on August 22, 2024. Since moving to AWS, the Average Speed of Answer dropped to 11.5 minutes in the final month of FY 2024.

Workload Measures	FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Result
Program Integrity					
Periodic CDRs Completed	1,492,926	1,615,561	1,506,195	1,611,019	1,342,105
Full Medical CDRs Completed (included above)	463,264	510,510	590,206	550,197	381,143
SSI Non-Medical Redeterminations Completed	2,153,109	2,367,391	2,202,803	2,515,721	2,550,132
Selected Other Agency Workload Measures					
Social Security Numbers Completed	12,906,716	11,576,821	16,118,113	18,138,054	18,733,872
Annual Earnings Items Completed	288,748,604	277,359,601	293,568,628	304,177,795	299,336,193
Social Security Statements Issued[17]	19,285,438	11,977,451	16,118,113	14,871,940	14,090,601
Selected Production Workload Measures					
Disability Determination Services Production per Workyear	255	239	230	240	246
Disability Determination Services Accuracy Rate	96%	97%	97%	97.5%	97.8%
Office of Hearings Operations Production per Workyear	93	78	64	69	79

[17] The Social Security Statements Issued measure includes paper statements only. It does not include electronic statements issued. In FY 2024, *my* Social Security users accessed their Social Security Statements more than 40 million times.

Challenges Identified by the Office of the Inspector General in FY 2024

OIG identified six top management issues for our agency:

Each year, the Office of the Inspector General (OIG) identifies our top management and performance challenges and publishes it on their website. Additionally, our leadership identified additional challenges facing our agency.

Below, we state the strategic initiatives we implemented to address the challenges identified by OIG and our leadership. Acronyms for the responsible components are listed in Appendix C, Summary of Key Management Officials' Responsibilities.

Manage Human Capital

Components: DCARO, DCBFM, DCCOMM, DCHO, DCLCA, DCO, DCRDP, OCIO, DCHR, OCACT, DCCREO, OGC, CTO, and OIG

Challenge: SSA must design and implement adequate plans to hire, develop, and retain the employees it needs to meet its mission, address its workloads, and provide the high level of customer service the public expects and deserves.

Our strategic initiatives to address this challenge include:

- Enhance Strategic Workforce Planning;
- Promote Diversity, Equity, Inclusion, and Accessibility;
- Expand Recruitment Efforts;
- Foster Employee Retention;
- Execute Talent Management and Succession Planning;
- Improve Employee Engagement;
- Strengthen the Performance Management Process;
- Invest in Training and Support for Managers; and
- Ensure Equity in Leadership Development.

Improve Service Delivery

Components: DCARO, DCBFM, DCCOMM, DCHO, DCO, DCRDP, OCIO, CTO, DCCREO and OIG

Challenge: SSA needs to enhance the customer experience via telephone and online services as well as updates to programs and policies.

Our strategic initiatives to address this challenge include:

- Ensure Equity and Conduct Outreach

- Ensure Equity and Improve Outreach;
- Enterprise Voice of Customer (VoC) Feedback Collection;
- Enhance *my* Social Security;
- Modernize the Social Security Statement;
- Expand Video Service Delivery;
- Enhance Online Appeals;
- Enhance Enterprise Scheduling System;
- Enhance the Digital Experience;
- Expand Online Options for Replacement SSN Cards;
- Modernize Information Technology;
- Improve 800 Number Services;
- Address Initial Disability Decision Wait Times;
- Enhance Disability Case Processing;
- Reduce the Hearings Backlog;
- Expand Access to Electronic Medical Evidence;
- Address the Processing Center Backlog;
- Modernize Our Debt Management;
- Ensure Timely and Accurate Payments to Claimants and their Appointed Representatives; and
- Improving the Disability Adjudication Process.

Protect the Confidentiality, Integrity, and Availability of Information Systems and Data

Component: DCARO, DCRDP, OCIO, and OIG

Challenge: SSA must ensure its information systems are secure and sensitive data are protected.

Our strategic initiatives to address this challenge include:

- Modernize Information Technology;
- Enhance Fraud Prevention and Detection Activities;
- Strengthen Our Information Security and Privacy Programs and Modernize Our Cybersecurity and Privacy-Enhanced Risk Management Infrastructure; and
- Expand Strategic Partnerships with External Partners.

Modernize Information Technology

Component: DCARO, DCBFM, DCHO, DCO, DCRDP, OCIO, CTO, and OIG

Challenge: SSA must continue modernizing its IT to accomplish its mission despite budget and resource constraints.

Our strategic initiatives to address this challenge include:

- Enhance *my* Social Security;
- Modernize the Social Security Statement;
- Expand Video Service Delivery;
- Enhance Online Appeals;
- Enhance Enterprise Scheduling System;
- Enhance the Digital Experience;
- Expand Online Options for Replacement SSN Cards;
- Modernize Information Technology;
- Improve 800 Number Services;
- Enhance Disability Case Processing;
- Expand Access to Electronic Medical Evidence;
- Modernize our Debt Management; and
- Strengthen Our Information Security and Privacy Programs and Modernize Our Cybersecurity and Privacy-Enhanced Risk Management Infrastructure.

Improve Administration of the Disability Programs

Components: DCARO, DCBFM, DCCREO, DCHO, DCO, DCRDP, OCIO, CTO, and OIG

Challenge: SSA needs to address concerns related to the timely and accurate processing of disability-related workloads, particularly initial disability claims, reconsiderations, and hearings. Also, SSA must work to ensure State DDSs have the necessary resources, including sufficient staff, to provide timely and accurate disability determinations.

Our strategic initiatives to address this challenge include:

- Ensure Equity and Conduct Outreach;
- Ensure Equity and Improve Outreach;
- Enhance Enterprise Scheduling System;
- Enhance Online Appeals;
- Enhance the Digital Experience;
- Address Initial Disability Decision Wait Times;
- Expand Video Service Delivery;
- Enhance Disability Case Processing;
- Reduce the Hearings Backlog;
- Expand Access to Electronic Medical Evidence;
- Address the Processing Center Backlog;
- Promote Timely Wage Reporting;

- Publish SSA/Administration Regulatory Priorities to Simplify SSI, Improve the Disability Adjudication Process, and Reduce Improper Payments;
- Improving the Disability Adjudication Process;
- Update the Listing of Impairments;
- Ensure Timely and Accurate Payments to Claimants and their Appointed Representatives; and
- Develop an Occupational Information System.

Improve the Prevention, Detection, and Recovery of Improper Payments

Components: DCARO, DCBFM, DCO, DCRDP, OCIO, OGC, and OIG

Challenge: SSA must be a responsible steward of the funds entrusted to its care by minimizing the risk of making improper payments and recovering overpayments when they occur.

Our strategic initiatives to address this challenge include:

- Address the Processing Center Backlog;
- Promote Timely Wage Reporting;
- Ensure Timely and Accurate Payments to Claimants and their Appointed Representatives;
- Enhance Fraud Prevention and Detection Activities;
- Modernize our Debt Management;
- Strengthen Our Information Security Program and Privacy Programs and Modernize Our Cybersecurity and Privacy-enhanced Risk Management Infrastructure; and
- Expand Strategic Partnerships with External Partners.

Additional Challenges Identified by Our Leadership

Prevent Fraud, Waste, and Abuse

Components: DCARO, DCO, DCRDP, and OIG

Fraud, waste, and abuse erode the public's trust in our ability to efficiently provide vital services. Fraud prevention is critical to conserving valuable resources and meeting our mission to meet the changing needs of the public.

Our strategic initiatives to address this challenge include:

- Address the Processing Center Backlog;
- Promote Timely Wage Reporting;
- Ensure Timely and Accurate Payments to Claimants and their Appointed Representatives;

- Enhance Fraud Prevention and Detection Activities;
- Strengthen Our Information Security Program and Privacy Programs and Modernize Our Cybersecurity and Privacy-enhanced Risk Management Infrastructure; and
- Expand Strategic Partnerships with External Partners.

Increasing Initial Disability Pending and Keeping Pace in the Disability Program with Medicine, Technology, and the World of Work

Components: DCHO, DCO, DCRDP, OCIO and CTO

One of our priorities is to improve the national average processing time for initial disability claims and work down older cases. We are identifying opportunities in policies, workloads, and processes for improving and enabling efficient and effective operations.

Additionally, medicine, technology, and the nature of work are constantly evolving. We must create an agile and responsive organization committed to keeping pace with those changes and maximizing efficiencies throughout the disability program.

Our strategic initiatives to address this challenge include:

- Address Initial Disability Decision Wait Times;
- Modernize Information Technology;
- Enhance Disability Case Processing;
- Expand Access to Electronic Medical Evidence;
- Develop an Occupational Information System;
- Improving the Disability Adjudication Process;
- Update the Listing of Impairments; and
- Expand Strategic Partnerships with External Partners.

Appendix A:
Program Assessments

We routinely conduct studies and surveys to evaluate the effectiveness of our programs. Continuous evaluation of program data, research, and analysis assist us in identifying strengths and weaknesses in our programs. Program evaluation results assist us in developing strategies to address the major challenges we face and improve how we administer our programs. We complete many of our evaluations annually, while others may be quarterly, biennial, triennially, or one-time efforts. We included within this section an introduction to the Annual Evaluation Plan and summary of findings for the most current reports available, organized by the Strategic Goal they support.

Evidence Act Deliverables (Annually)

As required by the *Foundations for Evidence-Based Policymaking Act of 2018*, we have developed Annual *Evaluation Plans* that describe our program evaluations to support our *FYs 2022–2026 Agency Strategic Plan* and other agency priorities. We are making progress on evidence-building activities specified in our *FYs 2022–2026 Learning Agenda,* and we have continued efforts to support our evidence-building capacity based on our *FYs 2022–2026 Capacity Assessment*. Our *Evaluation Plans* describe the most significant program evaluations that we will complete during the year. These plans are available on our website.

Customer Experience (Annually)

In accordance with EO 14058, *Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government*, we are designing and delivering services that focus on the experiences of the people we serve. We worked with CX industry experts to develop journey mapping standards and implement CX decision modeling to help us identify which aspects of our current service delivery channels are generating the greatest customer pain points to implement CX activities and solutions.

For FY 2024, we designated three HISP priority services to focus our CX efforts on: (a) applying for adult disability benefits, (b) applying for Social Security retirement benefits, and (c) applying for a replacement Social Security Number card. Based on feedback from our customers, we identified three delivery commitments in our 2023 CX Action Plan targeted towards our designated priorities: expanding the ability to change name online due to marriage to additional States, expanding the use of electronic signature and document upload functionality, and improving the process for obtaining adult disability benefits. We are proud to report that we successfully delivered on all these commitments in FY 2024. We added 12 new States to the 9 that were already allowing name change due to marriage online. We expanded electronic signature and document upload from a few

pilot offices to all field offices and workload support units nationwide and successfully launched a 4-part disability application business process improvement pilot in 18 field offices.

Visit Performance.gov for more information about our CX Action Plans.

Strategic Goal 1 – Optimize the Experience of SSA Customers

Prospective Client Survey (Biennially)

The Prospective Client Survey queries non-beneficiaries between ages 50 and 64 to identify service expectations and preferences of the upcoming wave of retirees. We targeted people in this age range because they are close enough to retirement to have thought about the subject. The most recent survey was completed in FY 2023. The published survey results reflect the opinions of 2,361 respondents. Those results revealed the following respondents' service expectations:

- 95 percent of respondents expect to wait no more than 10 minutes to speak with an employee on the phone;
- 96 percent of respondents expect to receive a return call by the next day or sooner;
- 95 percent of respondents expect to get an appointment in an office within a week;
- 98 percent of respondents with an appointment and 59 percent without an appointment expect to wait no more than 30 minutes to speak with an employee in the office; and
- 91 percent of respondents expect to receive a response to an electronic inquiry no later than the next day.

Based on the results of the survey, we offer the following recommendations:

- Although the findings indicate that all service delivery channels should be supported, maintained, and improved upon, we recommend prioritizing resources to improve current services and build new services on the SSA website because the website is the preferred contact method for the largest proportion of our prospective clients across all specific types of service.
- Strive to meet the service expectations of our future customers by reducing the amount of time customers wait for service.
- Continue active marketing of the benefits of establishing and using a *my* Social Security account. While we have seen a steady increase in account ownership over the years, the two most frequently noted reasons for not having an account were not having a need to create an account at this time (38 percent) and not knowing enough about *my* Social Security accounts (37 percent).

Retirement Application Survey (Biennially)

The Retirement Application Survey (RAS) measures customer satisfaction with the retirement application process and identifies service expectations and preferences for future service among recent retirees. We conducted the RAS most recently in FY 2024, with customers awarded retirement benefits between August and October 2023. The sample included applicants who filed in person, by telephone, and online. We conducted the survey by mail and for the first time online from December 2023 through March 2024. The results reflect the opinions of 5,005 respondents.

The purpose of the RAS is to measure SSA customer satisfaction with the retirement application process and to gauge customers' inclination for using electronic services for future Social Security business. We offer the following takeaways from the FY 2024 RAS data compared with the RAS Report conducted with customers in June through August 2022:

- The proportion of respondents who filed their applications for retirement benefits online and on the telephone declined in FY 2024.
- The percentage of respondents who said they made an appointment to file for benefits increased significantly in FY 2024.
- Satisfaction with how soon applicants could get an appointment to file for retirement benefits increased.
- Satisfaction with the clarity of the retirement decision letter increased.
- Overall satisfaction with Social Security service during the retirement application process increased in FY 2024.

Evaluation of the Ticket to Work and Other Employment Support Programs (Continuously)

The Ticket to Work and Other Employment Support Programs evaluation examines employment patterns and outcomes of disabled beneficiaries, including those beneficiaries who use employment services such as the Ticket to Work (TTW), Partnership Plus, and Work Incentives Planning and Assistance programs. We last completed a comprehensive evaluation in 2013. Additionally, we analyzed our implementation of the TTW program in a report on potential changes that we might consider for the Work Incentive Planning and Assistance program service model in 2020 and in a report on alternative payment structures for Employment Networks in 2021. We completed an independent 10-year evaluation of the TTW program in 2013, which produced seven reports. All reports are publicly available on our webpage.

Since the end of the comprehensive evaluation in 2013, we have funded analyses related to the TTW through our Retirement and Disability Research Consortium. These grants supported external researchers working both alone and in collaboration with SSA staff to

produce published papers, working papers, and conference presentations, including topics of relevance to the TTW program.[18] We also recently published a paper assessing the TTW evaluation findings to date and providing new results on TTW outcomes relative to costs.[19]

In FY 2023, we awarded a contract for a new formal evaluation of the TTW program. The evaluation will focus on determining the extent to which the program is effective, efficient, and equitable. The evaluation will consist of surveys, semi-structured interviews, an analysis of program data, and other data collection and analyses as appropriate. The evaluation research questions fall into the following four categories: program effectiveness and opportunities for improvement, consumer characteristics, service provision, and service equity. In FY 2024, we conducted document review, informal interviews with SSA staff, and listening sessions with service providers and beneficiaries to inform the evaluation design. In FY 2025, we are developing the survey instruments and conducting pre-tests for the surveys of providers to be fielded in FY 2026. We will produce interim reports beginning in FY 2026. The evaluation, along with final reports and datasets, will be completed in FY 2027. Further information on this new evaluation can be found on our website.

Strategic Goal 2 – Build an Inclusive, Engaged, and Empowered Workforce

Federal Employee Viewpoint Survey (FEVS) (Annually)

OPM administers the FEVS, which allows us to assess employee perspectives of organizational performance across several major human capital areas: recruitment, development, performance culture, leadership, job satisfaction, and personal work experiences. The 2024 FEVS results indicated both strengths and opportunities for improvement. The results showed improvements in employee perceptions of engagement, diversity, equity, inclusion, accessibility, and leadership. Questions with the highest positive responses show that employees desire to contribute to the common good, feel they are held accountable for achieving results and producing quality work, are treated with respect by their supervisors, and feel the agency prepares them for potential cybersecurity threats. The survey results also indicate that performance recognition is a persistent challenge and represents an opportunity for improvement. Questions concerning recognition, employee empowerment, innovation, and workload management represent the lowest positive responses.

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[18] The Retirement and Disability Research Consortium is an interdisciplinary extramural research program under which SSA funds research centers. These research centers manage and award grants supporting SSA's focal area topics.

[19] See "Effects of the Ticket to Work Program: Return on Investment and Overall Assessment of Outcomes Versus Design" by Paul O'Leary and Emily Roessel (Social Security Bulletin 83, no. 1 (2023): 1-39). https://www.ssa.gov/policy/docs/ssb/v83n1/v83n1p1.html .

Human Capital Evaluation System (Continuous)

We developed a Human Capital Evaluation System (HCES) to demonstrate our efforts to monitor and assess how well HC policies and programs support our mission, in compliance with OPM's Human Capital Framework (HCF). The HCES is an agency-wide system used to oversee the operations of HR management programs and assess the results of organizational performance and compliance with laws and regulations.

Our HCES consists of four activities and programs:

1) HCOP – Agency-level method of capturing HC and workforce planning initiatives, milestones, and performance measures:
    - Describes plans for executing the HC elements from our ASP and APR and addresses the government-wide priorities identified in OPM's HCF, Federal Workforce Priorities Report, and the President's Management Agenda.
    - Operationalizes goals of the government-wide and agency DEIA Strategic Plans.
    - Supports OMB Memorandum M-17-22, *Comprehensive Plan for Reforming the Federal Government and Reducing the Federal Civilian Workforce.*
2) HRStat – A strategic human capital performance evaluation process that identifies, measures, and analyzes human capital data to inform the impact of an agency's human capital management on organizational results with the intent to improve outcomes (5 CFR part 250 subpart B).
    - Tracks agency progress on HCOP activities, along with other data-based strategic HC and workforce planning activities.
    - Platform to raise HC issues in need of input or intervention to executives and discuss HC topics, policies, and program information with leadership to ensure consistent, effective communication while socializing and standardizing data-driven decision making.
3) Independent Audit Program (IAP) – Comprehensive virtual HCF audit of all 10 regional offices, Central Operations, and headquarters Servicing Personnel Offices (SPO) on a 5-year cyclical basis.
    - May include a review of more than 50 agency and OPM-defined outcomes across a variety of HR functions, such as: training, performance management, labor-management/employee relations, civil rights and equal opportunity, staffing (including delegated examining unit hiring and merit promotion), security and suitability, and work-life.
    - Conducted one audit in FY 2023 and found no significant issues (i.e., no illegal appointments or veterans' preference and adjudication issue).
    - As of April 2023, the 10 regional SPOs have been centralized under the office of HR. We are currently collaborating with OPM to determine the best

approach for conducting the IAP going forward, considering that the SPOs now report to the same organization responsible for conducting IAP evaluations. The second phase of centralization is currently on hold as we further evaluate its feasibility, taking into account its potential impact on our IAP.

4) Human Capital Review (HCR) – Discussion between agency HC leaders and OPM. The participants review agency HC results in connection with HCOP goals, their impact on strategic goals, as well as risks, barriers, and successful practices. Key elements of the HC business processes are discussed, including the HCOP, HRStat, and the IAP.
5) The FY 2024 HCR discussion with OPM took place on June 12, 2024. Overall, the HCES helps executive leadership assess the effect of HC strategies designed to achieve agency goals and contributes to our organizational performance as a mechanism to monitor and evaluate outcomes related to HC management strategies, policies, programs, and activities. Ensuring HC policies and programs support our mission is a critical step in evaluating organizational performance and determining how to improve processes. We maintain accountability for success and appropriate use of HR authorities across all HC endeavors with strategic internal tracking and assessment procedures.

Management Directive 715 Report (Annually)

We provide the status of our efforts to establish and maintain effective equal employment affirmation actions programs under Section 717 of Title VII of the *Civil Rights Act of 1964* and effective affirmation action programs under Section 501 of the *Rehabilitation Act of 1973*.

During FY 2024, the Office of Civil Rights and Equal Opportunity (OCREO) improved or continued efforts toward achieving the status as a Model Equal Employment Opportunity agency, as established in criteria issued by the Equal Employment Opportunity Commission (EEOC). These initiatives include:

1) Identifying and eliminating barriers to equal employment opportunity (EEO) by completing an analysis of detected triggers that indicate potential barriers. OCREO drafted the FY 2023 Barrier Analysis Findings Report. Once finalized, OCREO shared the report with each component to increase awareness of the agency's identified agency-wide triggers and barriers. The MD-715 Report includes actions to mitigate barriers and the agency updates the Barrier Analysis Action Plan as needed.
2) Providing the agency head with a State of the Agency Briefing that describes our efforts to attain model EEO agency status and component briefings to senior executives with a comprehensive analysis of their components' workforce demographics via "State of the Component Briefings" drafted in the fourth quarter of FY 2024. The analysis included workforce participation rates by race, ethnicity, gender, and disability

status, identifying areas in need of improvement based on low representational rates as compared to the civilian labor force. EEO Activity at the component level is provided, including the number of employees counseled, formal complaints filed, and ADR participation.

3) Marketing Alternative Dispute Resolution (ADR) to informally resolve EEO claims to employees and managers across the agency. The ADR process is a tool to promote voluntary settlements early and throughout the EEO process and to resolve workplace disputes in a positive and constructive manner at the lowest level. The ADR policy has helped promote manager and aggrieved participation in the ADR process. In FY 2024, the management participation in ADR was 92.3 percent, exceeding the EEOC's benchmark of 90 percent participation, and aggrieved participation in ADR was 48.7 percent, just shy of the EEOC's benchmark of 50 percent participation.
4) Collaborating with the Office of Labor-Management and Employee Relations (OLMER) on implementing the Notification and Federal Employee Anti-Discrimination and Retaliation Act (No FEAR) policy, under which OLMER conducts an independent review of complaints in any discrimination finding, "including those identified by investigations conducted under the agency's anti-harassment program." The purpose of the independent reviews is to determine whether to recommend disciplinary action against management officials named in an EEO complaint for which a finding of discrimination was issued. Under the No FEAR policy, OLMER may also review significant settlements. OLMER conducts these reviews on an ad hoc basis when OCREO receives either a finding from the EEOC or a settlement agreement that raises questions about the need for corrective action. OCREO submits findings and settlement agreements to OLMER for review, along with the Report of Investigation for the case. OLMER then analyzes whether to recommend disciplinary action and returns its recommendation to the component to consider taking action, if applicable.
5) Updating the agency's online EEO complaint tracking software to the current industry standard (EEO Entellitrak).
6) Improving accessibility for employees and applicants with disabilities through services and support. This effort includes assistive technology (and related training), adaptive devices, reader and personal assistants, interpreter services, and related services for employees who are deaf or hard of hearing. We completed and delivered mandatory training material as part of the agency's Employer of Choice for Employees with Disabilities initiative on topics such as Schedule A hiring authority, Selective Placement Program, and partnerships and outreach with disability organizations involved in the placement of applicants with disabilities. We developed mandatory eLearning training for Reasonable Accommodations, Schedule A Hiring Authority, and Disability Awareness for managers and supervisors.

Strategic Goal 3 – Ensure Stewardship of SSA Programs

Federal Information Security Modernization Act Report (Annually)

The *Federal Information Security Modernization Act* Report tells Congress whether our overall information technology security and privacy programs and practices comply with the *Federal Information Security Modernization Act of 2014*. In FY 2024, we continued our successful implementation of solutions for encrypting data-at-rest on end-users' devices, such as laptops and mobile phones, as well as our data centers, High Value Assets, and cloud providers. We maintained strong encryption for data transmitted to our business and data exchange partners. These efforts complement other areas of progress we have made in meeting enhanced requirements for endpoint detection and response and enterprise logging in support of OMB Memorandums M-22-01, *Improving Detection of Cybersecurity Vulnerabilities and Incidents on Federal Government Systems through Endpoint Detection and Response and* M-21-31, *Improving the Federal Government's Investigative and Remediation Capabilities Related to Cybersecurity Incidents*. In addition, we continue expanding onto the existing Identity, Credential, and Access Management strategy to target key requirements to enabling agency-wide MFA at the application and system level in compliance with Executive Order 14028, *Improving the Nation's Cybersecurity*.

Pre-Effectuation Review of Disability Determinations (Annually)

The Pre-Effectuation Review of Disability Determinations assesses the accuracy of State DDS initial and reconsideration adult disability allowances, per sections 221(a) and 1633(e) of the *Social Security Act*. The most recent results include FY 2020 data and estimates.

Safeguard Security Report (Annually)

We provide examples of our policies and procedures to demonstrate how we safeguard personally identifiable information and Federal tax information. We submit this report to the Internal Revenue Service (IRS) on an annual basis.

Safeguard Review (Triennially)

The Safeguard Review assesses the use of Federal tax information and the measures we employ to protect this information. This review is an onsite evaluation completed in collaboration with the IRS.

The IRS completed its full Safeguard Review of our agency in the summer of 2016. The review concluded with a closing conference in September 2016 and produced findings pertaining to both physical and IT security. We received one critical finding from the review and addressed it in June 2017. We report the findings from this review on a semi-

annual basis through submission of a corrective action plan to the IRS. The IRS postponed the June 2020 Safeguard Review (Triennial), due to the COVID-19 pandemic. In the summer of FY 2024, the IRS conducted an onsite, triennial Safeguard Review and provided the Safeguards Security Report. We had half as many findings in the FY 2024 report compared to the prior year assessment, with only one critical finding, which has already been remediated.

Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds (Annually)

The Board of Trustees reports annually to Congress on the financial and actuarial status of the two Social Security trust funds. The 2024 report was signed on May 6, 2024. At the end of 2023, the OASDI program was providing benefit payments to about 67 million people: 53 million retired workers and dependents of retired workers, 6 million survivors of deceased workers, and 9 million disabled workers and dependents of disabled workers. During the year, an estimated 183 million people had earnings covered by Social Security and paid payroll taxes on those earnings. The total cost of the program in 2023 was $1,392 billion, while total income was $1,351 billion. The combined OASI and DI Trust Fund reserves are projected to reach reserve depletion in 2035, at which time continuing income to the trust funds would be sufficient to pay 83 percent of scheduled benefits. For the 75-year projection period, the OASDI actuarial deficit is 3.50 percent of taxable payroll.

Annual Report to Congress on Medical Continuing Disability Reviews (Annually)

A legislatively mandated report provides summary information on medical CDRs conducted for a completed fiscal year. The most recent report includes FY 2017 data and estimates.

Report on Supplemental Security Income (SSI) Non-medical Redeterminations (Annually)

This report provides summary information on non-medical redeterminations of SSI recipients conducted for a completed fiscal year. The report includes actuarial estimates of the net Federal lifetime reductions in SSI and Medicaid benefits resulting from the reviews conducted during that fiscal year. The most recent report includes FY 2014 data and estimates.

Bipartisan Budget Act of 2015 Section 845(b) Report (Annually)

A legislatively mandated report provides summary information on work-related CDRs conducted for a completed calendar year. The report includes actuarial estimates of the net

lifetime reduction in OASDI benefits resulting from the CDRs conducted in that calendar year (CY). The most recent report includes CY 2021 data and estimates.

Annual Report of the Supplemental Security Income Program (Annually)

We report annually to the President and Congress on the status of the SSI program and provide 25-year projections of program participation and costs. In January 2024, 7.3 million individuals received monthly Federal SSI payments averaging $672, a decrease of about 119,000 recipients from the 7.4 million recipients with an average payment of $654 in January 2023. By 2048, the end of the 25-year projection period, we estimate that the SSI recipient population will reach 8.0 million. The projected growth in the SSI program over the 25-year period is largely due to the overall growth in the U.S. population, though we project the growth in the SSI recipient population to be somewhat slower than the growth in the U.S. population.

Enumeration Accuracy Report (Triennially)

We report the accuracy of original or replacement SSNs assigned during the fiscal year under review. In FYs 2015 and 2018, original SSN enumeration accuracy rates were 100 percent. For FY 2022, we randomly sampled 1,000 replacement card applications available to the public from May 2022 through August 2022. The FY 2022 Enumeration Quality Review determined the processing of replacement card applications had a 96.5 accuracy rate. The overall accuracy rate for SSN replacement cards was 96.5 percent.

Evaluation of WorkSmart that identifies Continuing Disability Reviews

We are evaluating the results from WorkSmart, the system used to identify work CDR cases. WorkSmart consists of three systems of computer programs that identify cases most likely to result in determinations of Substantial Gainful Activity. Our tracking and assessment each year indicate the need for improved coordination with our processing of cases and WorkSmart's releases. In FY 2023, we initiated a formal evaluation of WorkSmart to assess its effectiveness in selecting cases for work CDRs and to identify areas of improvement on the challenging task of separating enforcement releases that result in cessation or termination from cases that result in benefit continuation. We expect to report the evaluation findings in FY 2025.

Targeted Denial Review (Annually)

We assess the accuracy of reconsideration disability denials made by the State DDS. In FY 2024, we analyzed 26,388 cases and cited 1,350 decisional errors and 2,752 documentation errors. We returned 4,102 cases to the adjudicating components for correction—a return rate of 15.5 percent.

Retirement, Survivors, and Disability Insurance Stewardship Review (Annually)

Our Stewardship Review measures the accuracy of payments to persons receiving Social Security retirement, survivors, or disability benefits. The national dollar accuracy rates for FY 2023 (as reported in the 2024 AFR), defined as the percentages of dollars paid that are free of either an overpayment (O/P) or underpayment (U/P), were 99.76 percent for O/P and 99.94 percent for U/P based on random sampling. In FY 2022, the O/P accuracy rate was 99.49 percent and 99.86 percent for U/P. The differences between the FY 2023 O/P and U/P accuracy rates and FY 2022 O/P and U/P accuracy rate were not statistically significant. The results for FY 2024 will be available in FY 2025.

Information about the improper payments, root causes, and corrective actions in our programs for FY 2023 (and previous years) can be found on the Payment Accuracy website.

Supplemental Security Income Stewardship Review (Annually)

The SSI Stewardship Review measures the accuracy of payments to persons receiving SSI benefits by reviewing all non-medical factors of eligibility and payment. Information about the improper payments, root causes, and corrective actions in our programs for FY 2022 (and previous years) can be found on the Payment Accuracy website. In FY 2023, a sample of 3,831 cases provided statistically reliable data on the overall payment accuracy of SSI payments issued. The FY 2023 O/P accuracy rate was 90.82 percent with projected O/P dollars of $5.6 billion. The change in the rate from the FY 2022 rate (91.98 percent) was not statistically significant. The FY 2023 U/P accuracy rate was 98.56 with projected U/P dollars of $877 million. The change from the FY 2022 rate (98.82 percent) was not statistically significant. The results for FY 2024 will be available in FY 2025.

Supplemental Security Income Transaction Accuracy Review (Annually)

The SSI Transaction Accuracy Review (STAR) examines non-medical aspects of eligibility, such as income, resources, and living arrangement, to assess the adjudicative accuracy of SSI initial claims, redeterminations, and limited issues to ensure they are policy compliant. In FY 2023, a sample of 3,190 cases provided meaningful information about the quality of the non-medical aspects of these SSI transactions. The national case accuracy rates for FY 2023, defined as the percentage of cases free of either an O/P or a U/P, were 89.9 percent for O/P and 93.9 percent for U/P. In FY 2022, these rates were 92.0 percent and 94.0 percent, respectively. The change in the FY 2023 O/P case accuracy rate from FY 2022 is statistically significant. However, the change in the U/P case accuracy rate is not statistically significant.

In addition to case accuracy, STAR measures the accuracy of payments authorized, or dollar accuracy. The national dollar accuracy rates for FY 2023 were 98.5 percent for O/P and 99.4 percent for U/P. In FY 2022, these rates were 99.1 percent and 99.3 percent, respectively. The change in the FY 2023 O/P dollar accuracy rate from the FY 2022 rate is not statistically significant. Information about accuracy rates, deficiencies, and recommendations for FY 2023 (and previous years) can be found on the OQR reports website. The results of the FY 2024 review will be available in FY 2025.

Retirement, Survivors, and Disability Insurance Transaction Accuracy Review (Triennially)

We review non-medical factors of eligibility to assess recently processed retirement, survivors, and disability insurance claims to ensure compliance with operational policy. For FY 2023, the overall OASDI O/P case accuracy was 99.4 percent, and the overall OASDI U/P case accuracy was 97.4 percent. The case accuracy rates indicate that approximately 3-out-of-every 100 claims were incorrectly paid—about 0.6 out of 100 cases had O/Ps, and about 2.6 out of 100 cases had U/Ps. The OASDI national dollar accuracy rates for FY 2023 were 99.7 percent for O/Ps and 98.7 percent for U/Ps. The results for the FY 2024 review will be available in FY 2025.

Appendix B:
How We Ensure Our Data Integrity

We are committed to providing consistent, reliable, and valid data. We have internal controls to ensure that our data are quantifiable, verifiable, and secure. Our internal controls include:

- Audit trails;
- Integrity reviews;
- Separation of duties;
- Restricted access to sensitive data;
- Reviews at all levels of management; and
- Validation and verification in our System Development Life Cycles.

These same controls support the *Commissioner's Federal Managers' Financial Integrity Act* Assurance Statement.

Data Integrity Systems and Controls

We gather performance data using automated management information and other workload measurement systems. We assess the data in terms of four quality dimensions:

- Accuracy – Measures how well data adheres to specification (e.g., definitions, rules, and policies);
- Consistency – Measures reliability in internal and external reporting of data;
- Completeness – Measures missing occurrences or attributions of the data; and
- Timeliness – Measures the currency of the data (i.e., data are up-to-date and reporting occurs on time).

We conduct quality evaluations based on established internal methodologies. As we introduce new performance measures, we perform a comprehensive data assessment using the four quality dimensions. From the assessment results, we establish a baseline. After establishing the baseline, we automate continuous monitoring to sustain high-quality data. Continuous monitoring allows us to follow data trends and proactively remediate potential issues.

In our data quality program, we derive several accuracy and public satisfaction measures from surveys and work samples. These measures provide confidence levels of 95 percent or higher.

As part of our fiduciary responsibility to the public, we use an audit trail system (ATS) to protect our records and taxpayer funds from improper use. The ATS collects and maintains detailed information about our internal and public transactions. We store the data from programmatic and select Internet applications, so we can review transactions for fraud and abuse.

Audit of Our FY 2024 Financial Statements

The *Chief Financial Officers Act of 1990* requires the OIG, or an independent external auditor that it selects, to audit our financial statements. OIG selected Ernst & Young (EY) to conduct the FY 2024 financial statement audit.

The auditor found we fairly presented the basic financial statements, in all material respects, in conformity with accounting principles generally accepted in the United States of America for Federal entities. EY's FY 2024 audit report marked the 31st consecutive year that we received an unmodified audit opinion on our financial statements. The auditor also found that our agency maintained, in all material respects, effective internal control over our financial reporting.

EY cited two significant deficiencies identified in prior years. The significant deficiencies are internal control over certain financial information systems and internal control over accounts receivable with the public (benefit overpayments).

The audit included examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. The audit did not find instances of noncompliance with laws, regulations, or other materials tested.

Appendix C:
Summary of Key Management Officials' Responsibilities

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

Deputy Commissioner of Social Security (DCOSS) an appointed position, authorized to act on behalf of the COSS.

Chief Operating Officer (COO) oversees the daily business and operations of SSA and manages all agency programs and staff.

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

General Counsel (GC) advises the COSS, DCOSS, and all subordinate organizational components (except the Inspector General) on legal matters. GC also serves as the agency's Senior Agency Official for Privacy and oversees the implementation of privacy protections and ensures that all privacy requirements are met.

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

Chief Transformation Officer (CTO) facilitates the most critical business enhancements that serve the public and support our frontline employees.

Deputy Commissioner for Analytics, Review, and Oversight (DCARO) oversees the review of program quality and effectiveness and makes recommendations for program improvement utilizing feedback from the adjudication of cases, predictive modeling, and other advanced data analysis techniques. DCARO also coordinates the agency's anti-fraud initiatives, responds to the recommendations of external monitoring authorities, and serves as the accountable official for improper payments.

Deputy Commissioner for Budget, Finance, and Management (DCBFM) directs our comprehensive management programs including budget, financial policy, acquisition, grants, facilities and logistics management, and security and emergency preparedness. DCBFM also serves as the Chief Financial Officer, Performance Improvement Officer, the Program Management Improvement Officer, and the responsible official for Enterprise Risk Management and the Digital Accountability and Transparency Act.

Deputy Commissioner for Civil Rights and Equal Opportunity (DCCREO) ensures compliance with the laws and regulations that govern Federal-sector Equal Employment Opportunity, promotes an equitable and inclusive work environment, and serves as the agency lead for Diversity, Equity, Inclusion, and Accessibility.

Deputy Commissioner for Communications (DCCOMM) conducts our national public information and outreach programs and fosters the transparency of our operations.

Deputy Commissioner for Hearings Operations (DCHO) administers our nationwide hearings program in accordance with relevant Federal laws.

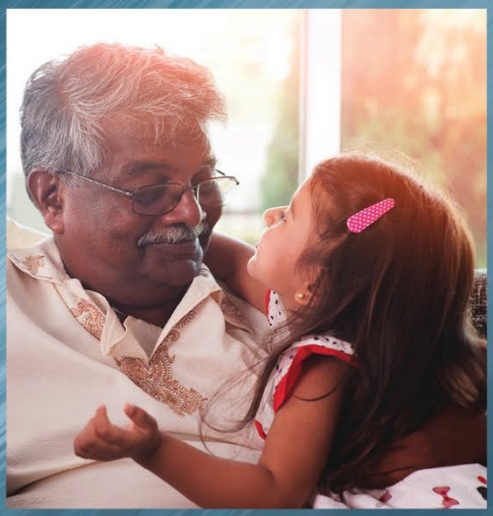
Deputy Commissioner for Human Resources (DCHR) administers our human resources programs, including training, human capital initiatives, personnel and employee relations, and labor management. DCHR also serves as the Chief Human Capital Officer and the senior accountable official on employee engagement initiatives.

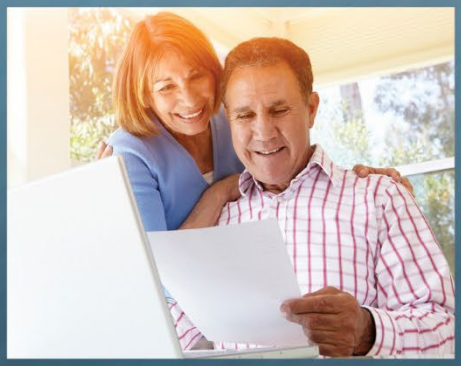
Deputy Commissioner for Legislation and Congressional Affairs (DCLCA) develops and conducts our legislative program, serves as our liaison to Congress, and analyzes legislative and regulatory initiatives.

Deputy Commissioner for Operations (DCO) directs our network of field offices, National 800 Number teleservice centers, and processing centers. DCO also oversees the State disability determination services.

Deputy Commissioner for Retirement and Disability Policy (DCRDP) advises the COSS on major policy issues and is responsible for all activities in the areas of program policy planning, policy research and evaluation, statistical programs, and overall policy development, analysis, and implementation. DCRDP provides enterprise-wide oversight data-sharing agreements and negotiates Social Security (totalization) agreements with foreign governments. DCRDP serves as liaison with the Centers for Medicare and Medicaid Services and leads our efforts to improve the clarity, tone, and readability of our notices. DCRDP also leads our efforts in implementing the *Evidence-Based Policymaking Act of 2018*.

Chief Information Officer (CIO) directs the strategic management of our systems and databases, which includes the development, validation, and implementation of new systems. OCIO directs operational integration, strategic planning processes, and implementation of a systems configuration program. The OCIO also provides strategic vision, aligns information technology initiatives with overall business goals, and drives innovation.





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