Social Security Administration

Annual Performance Plan for Fiscal Year 2025

Revised Performance Plan for Fiscal Year 2024

Annual Performance Report for Fiscal Year 2023

Securing today
and tomorrow

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Message from the Commissioner

As the Commissioner of the Social Security Administration (SSA), I present our *Annual Performance Plan for Fiscal Year 2025, Revised Performance Plan for Fiscal Year 2024, and Annual Performance Report for Fiscal Year 2023,* which details our priorities and goals for the next two fiscal years and our accomplishments in the past fiscal year.

We are an outstanding organization with dedicated public servants, yet we are struggling to overcome significant challenges, resulting in our current customer service crisis. Millions of people depend on us as their financial safety net, and it is imperative that we provide them with timely, quality service. We recognize people have been waiting far too long for vital services, brought on by years of underfunding and staffing shortages.

We are prioritizing the reduction of our record backlogs in processing disability cases. Nationally, our customers are waiting nearly eight months for a decision on an initial disability claim, which is far too long. We are working diligently to assist the State disability determination services (DDS), which have struggled to hire and retain the staff necessary to make timely disability decisions. We are using technology to serve more beneficiaries than ever before and exploring new ways to increase efficiency and productivity. For example, we established a Federal cross-agency team dedicated to increasing DDS processing capacity and reducing claims backlogs.

Millions of customers count on our National 800 Number technicians to answer important questions, and we know many people have experienced lengthy delays waiting to speak with an agent, particularly during our peak call periods. We recently transitioned our National 800 Number from an outdated service platform to our Next Generation Telephony Project. Although we expect the new system to make major improvements to reduce customer hold times and improve service by providing stable, reliable, and accessible phone service to the public, it will not fully resolve our phone service issues. We must also increase our teleservice center staffing and retain qualified staff to provide callers with timely service and improve the customer experience.

We are committed to ensuring that our programs and services are reaching the elderly, underserved communities, and other people facing potential barriers to accessing our services, including individuals with low income, limited English proficiency, mental and intellectual disabilities, and/or facing homelessness. We are listening to our customers—and our employees on the frontlines—and commit to improving the customer experience and agency performance.

As good stewards of our programs, we strive to reduce improper payments and combat waste, fraud, and abuse through our quality reviews, cost-effective program integrity work, and payment accuracy efforts. We will fight against malicious cyber campaigns that threaten our security and privacy, placing cybersecurity at the forefront of our effort to protect the sensitive information entrusted to us.

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

Respectfully,

Martin O'Malley

Baltimore, Maryland
March 11, 2024

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) 2023, we paid OASI benefits to an average of approximately 58 million beneficiaries each month and we paid almost $1.2 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 2023, we paid DI benefits to an average of approximately 9 million beneficiaries each month and we paid $149.4 billion 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 2023, we paid SSI benefits to a monthly average of 7.5 million recipients (approximately 2.5 million of whom concurrently receive OASI or DI benefits) and we paid over $63 billion 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, and Federal Benefits for Veterans, and programs associated with the *Employee Retirement Income Security Act of 1974*, *Coal Industry Retiree Health Benefit Act*, and *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.

Organization

As of the end of FY 2023, over 61,000 Federal employees and 15,000 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.

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

Administrative law judges (ALJ) in our hearing offices and administrative appeals judges in our Appeals Council decide appealed cases. By the end of FY 2024, we plan to achieve our goal of eliminating the ALJ disability hearings backlog.

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.

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.

Strategic Goals	Strategic Objectives	Supporting Strategies
Optimize the Experience of SSA Customers	Identify and Address Barriers to Accessing Services	• 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
	Expand Digital Services	• Better understand our customers' service preferences • Address our customers' service needs • Increase the use of secure digital services
	Build a Customer-Focused Organization	• Continue modernizing our information technology • Improve timeliness and eliminate and prevent backlogs
Build an Inclusive, Engaged, and Empowered Workforce	Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement	• Conduct analyses to identify and address any systemic barriers present in hiring and advancement • Broaden reach for hiring and promote retention
	Support Employees' Chosen Career Paths	• Invest in our employees • Ensure inclusive leadership development
Ensure Stewardship of SSA Programs	Improve the Accuracy and Administration of Our Programs	• 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
	Identify and Eliminate Potential Barriers to Access Contracts and Grants	• 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
	Improve Organizational Performance and Policy Implementation	• Simplify our policies and modernize our processes • Strengthen program and resource management • Expand strategic partnerships with external partners

Cross-Agency Priority Goals

The *GPRA Modernization Act of 2010* requires agencies to address Cross-Agency Priority Goals in our strategic plan and the annual performance plan. 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 2022–2023 and FYs 2024–2025, continuing our efforts to improve performance in the same priority areas. Our APGs support multiple objectives across our strategic plan. The following tables include our prior and new APGs and targets, FY 2023 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 2022–2023 Agency Priority Goals	FY 2023 Target	FY 2023 Results
Improve Equity in the Supplemental Security Income Program Improve equity in our Supplemental Security Income program through increased outreach and improved benefit delivery, including to communities of color and underserved communities Strategic Objective 1.1: Identify and Address Barriers to Accessing Services **Improve the National 800 Number Service** Improve the customer experience by reducing the Average Speed of Answer on the National 800 Number Strategic Objective 1.3: Build a Customer-Focused Organization	• By September 30, 2023, increase the number of all SSI applications by 15 percent, relative to the 2021 baseline, restoring rates closer to pre-pandemic levels • By September 30, 2023, increase the number of SSI applications from underserved communities by 25 percent, relative to the 2021 baseline • By September 30, 2023, achieve an average speed of answer of less than 12 minutes, including implementation of estimated wait time and call back options	• We received about 1.74 million SSI initial claims, which was about 1 percent short of our target • Our FY 2023 underserved applications target was about 128,000, and we exceeded it by receiving nearly 135,000 SSI initial claims from underserved communities • Our FY 2023 average speed of answer was 35.8 minutes
Improve Initial Disability Claims* Improve the customer experience by reducing the average processing time for initial disability claims and by prioritizing those individuals who have waited the longest for initial disability determinations Strategic Objective 1.3: Build a Customer-Focused Organization **Focus Area for Improvement*	• By September 30, 2023, achieve an average processing time for initial disability claims of 164 days • By September 30, 2023, decide 85 percent of pending initial disability claims that begin the fiscal year 180 days old or older	• Our FY 2023 average processing time for initial disability claims was 218 days • We decided 365,215 (about 97 percent) of initial claims that started FY 2023 180 days old or older exceeding our target.

FYs 2024 – 2025 Agency Priority Goals	FY 2025 Target
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
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[1], including implementation of estimated wait time and call back options[2] [1] We will continue to evaluate this aspirational goal as we gain experience with a new phone system and monitor the impact of a current FY 2024 hiring freeze on the number of phone agents. [2] This target is also a budgeted workload measure.
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[3] • By September 30, 2025, decide 92 percent of pending initial disability claims that begin the fiscal year 180 days old or older [3] This target is also a budgeted workload measure.

Performance Measures At A Glance

The following table shows our FYs 2024 and 2025 performance measures (excluding agency priority goals and budgeted workload measures), aligned with the strategic goals and objectives in 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 (HUB) Zone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses
	3.2b: Increase funding for Historically Black Colleges and Universities (HBCUs) and Institutions Serving Students of Color (ISSC)
3.3: Improve Organizational Performance and Policy Implementation	3.3a: Reduce our real property footprint

Strategic Goal 1: Optimize the Experience of SSA Customers

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 2023 Performance Measure Target and Results (see details)		
1.1a: Redesign SSA's website to enhance the user's online experience	Achieve a 1.5% increase from baseline satisfaction for customers using SSA's website	● Met
1.1b: Collect Customer Feedback	Establish end of journey feedback collection for priority service designations	● Not Met

What Did We Accomplish in FY 2023?

We made noteworthy progress with this strategic objective by providing equity training and increasing our outreach efforts.

- Completed over 19,000 outreach events for underserved communities, which included releasing Dear Colleague Letters to promote awareness of our programs and sending outreach mailers to beneficiaries who may also be eligible for SSI.
- Partnered with SSI outreach organizations and advocacy groups that help people apply for SSI, resulting in over 3,750 SSI claims.
- Notified 1.4 million Social Security beneficiaries of their potential eligibility for SSI, resulting in 48,567 approved SSI claims paying over $11 million in benefits through March 17, 2023.
- Improved communication efforts throughout the disability process by routinely engaging in meetings with the representative and disability advocacy communities.
- Streamlined our customer feedback platform with enhanced feedback channels and data collection tools.
- Implemented two mandatory agency-wide Diversity, Equity, Inclusion and Accessibility (DEIA) trainings regarding workplace harassment, discrimination, and disability awareness; and an executive training regarding inclusive workplace cultures.
- Established a cross-component workgroup on implicit bias and worked with training experts to assess and develop a new training curriculum.
- Developed DEIA training that will help our adjudicators understand, recognize, and remove barriers to fair and equitable decision making.
- Expanded race and ethnicity data collection to improve our ability to determine whether our

programs are equitably serving our applicants
and beneficiaries.

What Do We Plan to Accomplish in FYs 2024 and 2025?

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

We are expanding our network of advocates and community-based organizations and will meet with them regularly to address the needs of people facing barriers to accessing our services as outlined in our *Equity Action Plan* and the *2023 Update to the Equity Action Plan*.

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*. This includes outreach to migrant and Native American and Alaska Native communities, and to individuals with limited English proficiency (LEP). We are conducting proactive outreach to help same-sex couples that were previously denied spousal survivor benefits. We will continue to conduct SSI outreach, including to those in underserved communities. In FY 2024, we will improve program data collection by working to include race and ethnicity data through the Enumeration at Birth (EAB) process. We will also encourage customers to provide their race and ethnicity when completing applications for new or replacement Social Security number (SSN) cards. We plan to generate research using enhanced program data and a matched Census Bureau survey to identify potential disparities for smaller demographic populations of disability beneficiaries and applicants. We will also develop a Community Advisory Board composed primarily of individuals with OASDI or SSI experience to inform our research, customer experience, outreach, and other activities. In FY 2025, we will increase the number of States we partner with to collect race and ethnicity data through EAB. We will include diverse stakeholders and representatives of underserved communities in National Disability Forums or similar activities, providing them opportunities to share their unique insights. 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 will review and update agency-wide policies and trainings to ensure equity in our programs. We support unrepresented claimants at the hearing level during our administrative review process, including by providing assistance to claimants to prepare for the hearing. We assess our processes and procedures for potential actions that may result in disparate

outcomes for unrepresented individuals. We provide in-person hearings, traditional video hearings, online video hearings, and hearings by telephone, offering a variety of accessible participation options to claimants. In FYs 2024 and 2025, we will engage claimant representative 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. We will also continue outreach to unrepresented claimants at the pre-hearing phase to inform them of their rights at the hearings level of appeal.
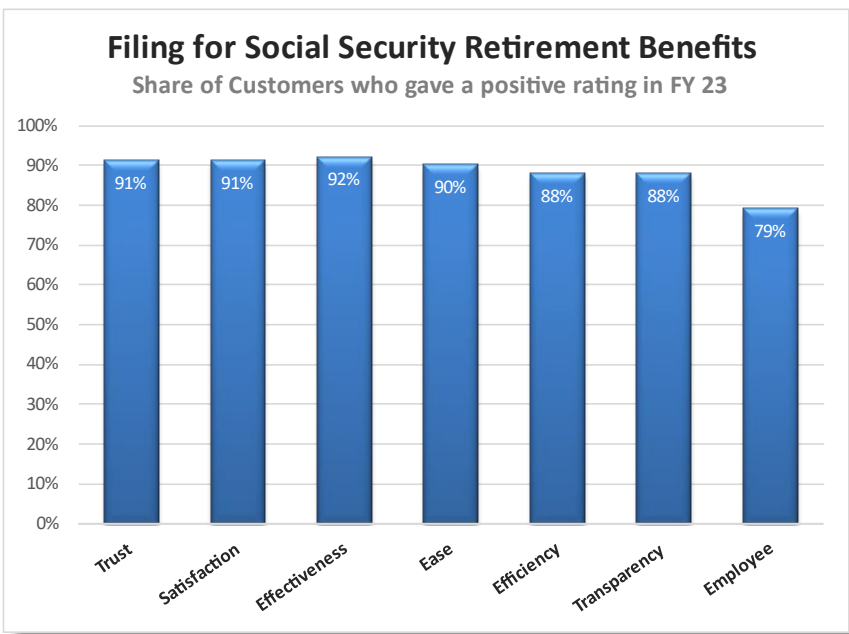
Strategy: Conduct implicit bias training for employees

In FYs 2024 and 2025, we will provide additional agency-wide DEIA and implicit bias training. We also plan to implement implicit bias adjudicator training to help adjudicators better understand, recognize, and remove barriers to fair and equitable decision making.

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 will analyze data from various sources to identify areas for improvement.

Enterprise Voice of Customer (VoC) Feedback Collection: Our VoC feedback collection allows us to capture real-time customer feedback across service channels to help identify pain points along

customers' journeys. We collect customer feedback for two of our three high impact service provider (HISP) priority service designations: (a) Filing for Social Security retirement benefits and (b) Applying for a replacement Social Security card. We established a cross-functional transformational journey team to conduct customer research, pain point analysis, service design, stakeholder enablement, and performance measurement for our third priority service designation, (c) Obtaining Adult Disability Benefits.

Filing for Social Security Retirement Benefits
Share of Customers who gave a positive rating in FY 23

Trust	91%
Satisfaction	91%
Effectiveness	92%
Ease	90%
Efficiency	88%
Transparency	88%
Employee	79%

We are partners in OMB's life experience projects, which are intended to streamline Federal Government service delivery at some of the most critical moments in people's lives. We have been engaged in the Approaching retirement and Facing a financial shock life experiences. We will continue to support life experience projects to the degree that we are able, within the context of our budget and agency priorities. In FY 2024, we will integrate Customer Experience (CX) management

disciplines throughout the agency, such as customer research, measurement, understanding, customer journey mapping, human-centered design, and customer-centric culture. We will use insights derived from our VoC feedback to develop and implement human-centered design solutions to address customer pain points and improve customer satisfaction. In FY 2025, we plan to measure the impact of solutions such as standardized appointment messaging, alternate contact information, a new disability process video, and an updated disability starter kit from the cross-functional Disability Journey Transformation Team. We also plan to study the impact that key performance indicators have on National 800 Number customer satisfaction and measure the impact of improvements we made for customers to submit online forms, including SSI, using mobile accessible tools and electronic signatures.

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

Long term Goals
- Improve equity in our SSI program through increased outreach and improved benefit delivery, including to communities of color and underserved communities.   - Improve equity and benefit delivery in our programs through increased outreach and the detection of disparities using data collection and analysis.   We are making progress toward our long-term equity goals through our efforts to improve our outreach to underserved communities and collect service delivery feedback from our customers.

Performance Measures[4]

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
1.1a: Redesign SSA's website to enhance the user's online experience	Not available	We completed the content audit for the full information-al site, completed the new information architecture and design, and completed the retirement path updates	We implement-ed 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)	Achieve a 1.5% increase from baseline satisfaction for customers using SSA's website	**Met** Website Customer Satisfaction Score (CSAT) increased by 46.8%	Achieve a 1% increase in satisfaction for customers using SSA's website over FY 2023 results (target CSAT 71.0)	Achieve a 1% increase in satisfaction for customers using SSA's website over FY 2024 results (estimated target CSAT 72.0)
	FY 2023 Performance Progress							
	Target Met: We met our target for achieving a 1.5 percent increase from baseline CSAT in FY 2023. The baseline period for CSAT, from September through November 2023, yielded a score of 47.7. CSAT after launch on December 6, 2022, through September 30, 2023, was 70.0, a 22.3 point (46.8%) increase.							

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

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
1.1b: Collect Customer Feedback	Not available	Not available	Not available	Not available	Establish end-of-journey feedback collection for priority service designations	**Not Met**	Establish baseline customer experience scores for priority service designations	Achieve a 2% increase in Customer Satisfaction for two customer experience journeys
	FY 2023 Performance Progress							
	Target Not Met: We did not meet our target to establish end of journey feedback collection for priority service designations (retirement, enumerations, and disability) in FY 2023, although we made progress towards developing a targeted disability applicant survey.							

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

FY 2023 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 (381 million)	● **Met**

What Did We Accomplish in FY 2023?

We expanded our digital service options to meet the service needs of our customers.

- Extended our Internet Social Security Number Replacement Card (iSSNRC) application to 47 States and Washington, DC.
- Increased our iSSNRC name-change-due-to-marriage initiative to nine participating States.
- Expanded MS Teams replacement SSN card interview options to include date of birth corrections verified by Electronic Verification of Vital Events.
- Deployed the Enterprise Scheduling System (ESS), allowing customers to self-schedule enumeration appointments in all 50 States, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, which totaled over 230,000 enumeration appointments.
- Implemented the *i454*, allowing adult beneficiaries to complete and submit the Medical Continuing Disability Review (CDR) report, SSA-454, online.

# What Do We Plan to Accomplish in FYs 2024 and 2025?

Strategy: Better understand our customers' service preferences

We market our customer feedback collection 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. In FY 2024, we plan to provide customers with more options to update their addresses online, including those who are dually entitled to retirement and disability benefits.

Additionally, we plan to provide customers with the ability to provide tax withholding information

online, and we will enhance our online 1099/SSA-1042S benefit tax statement application, allowing customers to access historical benefit statements for the five previous tax years. We will move *Upload Documents* (formerly *eSubmit*) behind *my* Social Security and enhance the claims status tracker and earnings correction screener. We will also upgrade our wage reporting application to a cloud-based platform, allowing for a more user-friendly experience.
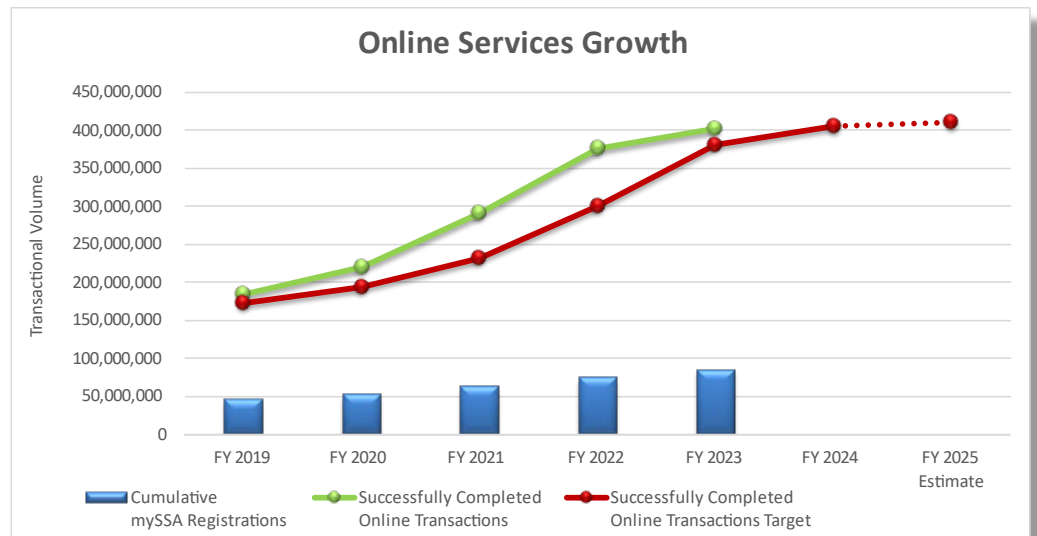
Modernize the Social Security Statement: The modernized *Statement* provides users with their earnings records, Social Security and Medicare taxes paid, and future benefit estimates. The *Statement* also includes targeted supplemental fact sheets and links to retirement planning tools, calculators, and other applicable information. In FY 2024,

Social Security Statements

we will conduct cognitive testing on the Spanish Statement and fact sheets. In FY 2025, we will implement feedback from this cognitive testing to improve the understanding of our documents for our Spanish-language customers.
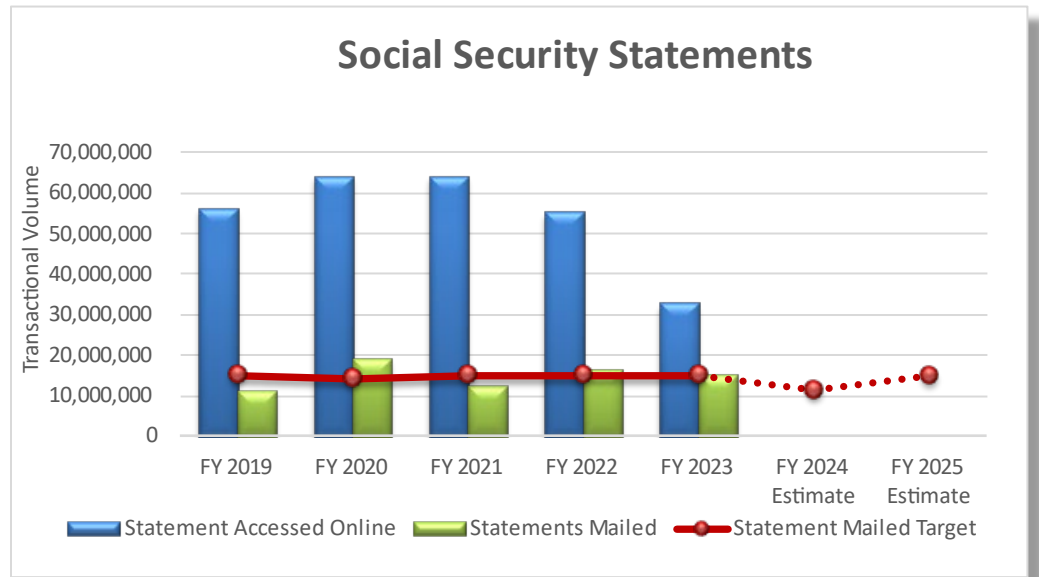
Strategy: Address our customers' service needs

We will introduce online options and improve services provided over the phone and in our offices.

Expand Video Service Delivery (VSD): VSD provides options for the public to conduct some transactions by video with our employees. In FY 2024, we plan to expand video access to improve the timeliness of our service to claimants and balance workloads across our offices. We will also implement the review and acceptance of some evidence via video, as well as implement changes to SSA's appointment management systems to improve efficiency for customers requesting video interviews. In addition, we are working with the Department of Homeland Security (DHS) to utilize video services to issue non-U.S. citizen replacement SSN cards. In FY 2025, we plan to expand video service options for hearings, interviews for replacement SSN cards, and post-entitlement actions. In FY 2024 and FY 2025, we also will be working to expand our marketing efforts to increase the number of video devices available to customers visiting field offices and add additional third-party video partner sites.

Enhance Online Appeals: We are improving the iAppeals online application process for people who appeal an agency decision for non-medical reasons. In FYs 2024 and 2025, we plan to expand our appointed representative and claimant self-service options based on feedback from initial deployment.

Enhance Enterprise Scheduling System: ESS allows for customer self-scheduling for enumeration services. In FY 2024, we plan to add group booking options for enumeration services so that one individual can schedule an appointment for multiple people. We also plan to provide options for video appointments and expand services to additional U.S. territories. In FY 2025, we will expand ESS

functionality to include initial claims scheduling for both technician and customer self-scheduling. In FYs 2024 and 2025, we will also consolidate multiple applications and functions into one enterprise solution, allowing the public to use their mobile devices to schedule appointments with us to apply for benefits.
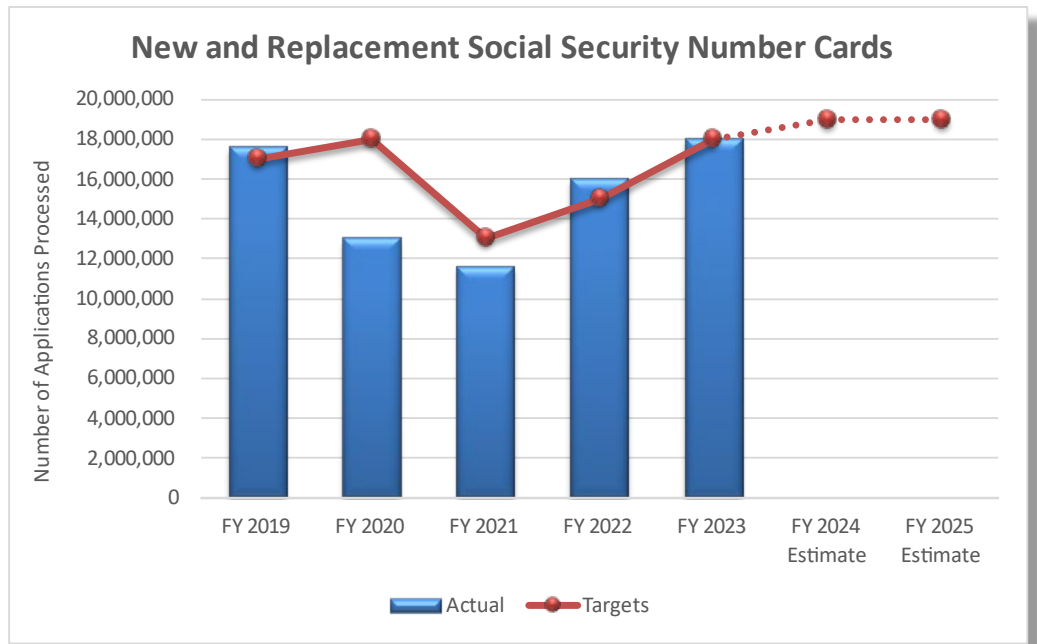
Strategy: Increase the use of secure digital services

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. We are working to expand our digital self-service option, *Upload Documents*, to customers in more geographic areas. This service allows users to electronically upload specific forms, documents, or evidence associated with their transaction, without the need to travel to a field office. We are prioritizing the review of forms and policies to either remove signature requirements or allow electronic signature options. We are also working to allow customers to upload retirement, SSI, and disability-related forms and evidence. In FYs 2024 and 2025, we will expand the selection of forms available via *Upload Documents* and explore other digital capabilities related to our document management process.

Expand Online Options for Replacement SSN Cards: We are expanding online service options for replacing SSN cards, reducing the need to visit an office. Currently, customers can request a no-change replacement SSN card in 47 States and Washington, DC, and a name-change SSN card in 17 States. In FYs 2024 and 2025, we plan to expand our State data exchange programs to allow customers to request a replacement SSN card in the remaining three States (Alaska, Oklahoma, and New Hampshire). We will fully automate updates to the Numident record SSN database. We will also automate the process for

New and Replacement Social Security Number Cards

issuing replacement SSN cards for individuals granted U.S. naturalization through our Enumeration Beyond Entry process data exchange through DHS. We are also working to increase the use of online options where available.

Long term Goals

- Increase the number of services and forms available on our secure digital platforms to provide more convenient, user-friendly, and secure digital self-service options.
- Increase the usage of our secure digital services so that customers can conduct business with us at their convenience.

We are making progress toward our long-term goals by expanding our online service options and providing additional service choices.

Performance Measures

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
1.2a: Increase the number of successfully completed online transactions	184 million	221 million	290 million	376 million	Increase the number of successfully completed online transactions by 5 million over the prior year (381 million)	**Met** 401.5 million	Increase the number of successfully completed online transactions by 5 million over the prior year (406 million)	Increase the number of successfully completed online transactions by 5 million over the prior year (estimated target of 411 million)
	FY 2023 Performance Progress							
	Target Met: We exceeded our FY 2023 target of 381 million online transactions and completed about 25.8 million more transactions than FY 2022.							

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

FY 2023 Performance Measure Target and Results (see details)		
1.3a: Provide uninterrupted access to our systems during scheduled times of operations	99.90% availability	● **Met**
1.3b: Modernize evidence acquisition systems to drive increased electronic medical evidence volumes through a multi-channel strategy	Acquire 56% of electronic medical evidence	● **Not Met**
1.3c: Improve customer service by addressing the number of actions pending at the processing centers	4.7 million	● **Met**

What Did We Accomplish in FY 2023?

We expanded our partnerships and streamlined our operational processes. Improving our initial disability wait times and our PC performance are focus areas for improvement.

- Convened a Disability Tiger Team and a Retention and Recruitment Workgroup (with DDS representatives) to develop and implement solutions to eliminate the disability backlog and recruit and retain employees at the State level.
- Re-directed Federal resources to provide immediate support for disability claims processing.
- Established a national contract to recruit and manage medical and psychological consultants and issued guidance permitting telehealth for certain consultative examinations.
- Integrated all disability case processing systems and used Intelligent Medical Language Analysis Generation to identify cases containing medical evidence that likely meet or equal a medical listing for expedited processing.
- Onboarded two large health networks and 20 new health partners to increase the submission of electronic medical evidence.
- Improved our system availability by expanding cloud service capabilities and automating alerts for performance issues and resource constraints.
- Registered an additional 8,746 Electronic Records Express (ERE) users, resulting in an increase of 12 percent. Medical evidence received via ERE accounts for 27.66 percent of the total MER volume.
- Improved the Technician Experience Dashboard (TED) to provide customers with the ability to submit documents electronically.
- Completed TED roll-out to the Boston Region to provide technicians with the ability to verify

customers, review customers' data, and launch
selected workflows from a single dashboard.

What Do We Plan to Accomplish in FYs 2024 and 2025?

Strategy: Continue modernizing our information technology

We will improve self-service support tools and video options, allowing our customers to choose how and when to conduct business with us. 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): In FYs 2024 and 2025, we will expand our online self-service appointment-scheduling capabilities, increase the number of forms customers can access and complete online, and simplify our process to apply for SSI benefits. We plan to create an online SSI application that is simple to use, accessible, equitable, transparent, and responsive for all customers. We plan to automate more services on our website, including adding customer-centric portals, mobile applications, and claim status information. We will conduct risk assessments and implement protocols to ensure online services are secure and accessible.

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 are experiencing to speak with an agent. We are improving service by implementing estimated wait time and call back options, completing our new agent training rollout, and relaunching the customer satisfaction survey.

In FY 2024, we plan to increase newly hired agent performance by improving our training processes and continuing to improve our telephone platform. We will also evaluate and start implementing strategies for improving our 800 Number performance. In FY 2025, we will continue implementing process improvement strategies and assess additional automated features to improve our 800 Number service to the public. Our 800 Number APG demonstrates our commitment to improve service delivery.

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. In FYs 2024 and 2025, we will focus on reducing processing time and prioritizing claims from individuals who have waited the longest for a disability decision. We will continue working with the DDSs to address ongoing challenges with recruitment and retention. The

President's Budget will support ongoing hiring to rebuild our staff in FY 2025. We will leverage our Federal disability processing units to provide maximum assistance for processing disability claims. Our APG focused on improving the wait time for an initial disability determination 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 disability case processing throughout our enterprise. In FYs 2024 and 2025, we plan to provide greater efficiency and improve the quality of our processes. We will meet the growing needs of the disability workload and prioritize IT enhancements to help reduce the disability claims backlog.

Reduce the Hearings Backlog: We are eliminating the hearings backlog and reducing the time it takes to receive a hearing decision. As the DDSs process increased volumes of initial claims and reconsiderations, we are preparing for a downstream increase in requests for hearings, Appeals Council review, and civil action court filings. We plan to eliminate the backlog and reduce the average wait for a hearing to 270 days by the end of FY 2024. To prevent the recurrence of the backlog in FY 2025 and retain average wait time for a hearing of no more than

270 days, we will monitor our incoming workloads and our capacity to complete work, replace our ALJ losses, and maintain our support staff levels.
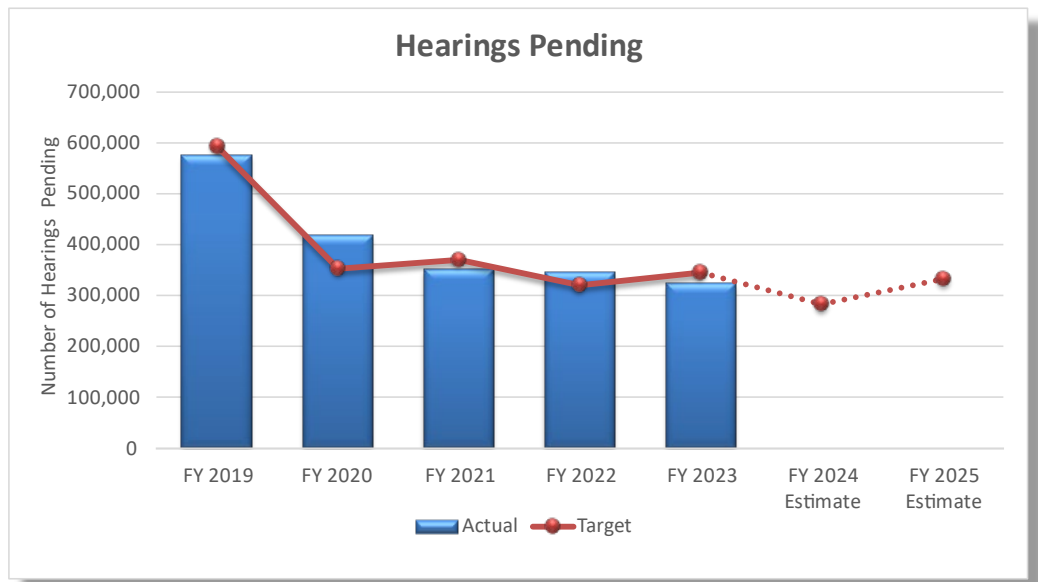
Expand Access to Electronic Medical Evidence: We offer medical providers multiple electronic options to submit evidence via our automated Health IT program, Electronic Records Express web portal, and web services. In FY 2024, we plan to onboard partners through our connections with large data exchange companies to increase the submission of electronic medical evidence. We plan to modernize our electronic medical evidence gathering capabilities to meet the needs of the end users. In FY 2025, we plan to update and implement software to increase our ability to obtain electronic medical evidence.

Addressing 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. In FY 2024, we

plan to expand our use of RPA, process the oldest pending cases across all workloads, and share workloads across our eight PCs to engage all available processing capacity. In FY 2025, we plan to automate additional PC workloads.

Long term Goals

- Improve the customer experience by reducing the Average Speed of Answer on the National 800 Number.
- Improve the customer experience by reducing the average processing time for initial disability claims and by prioritizing those individuals who have waited the longest for initial disability determinations.
- Increase our customers' ability to electronically transact business with the agency to increase equity and accessibility to our services.

We are exploring new options to address our service delivery challenges. We established dedicated teams to increase DDS processing capacity and reduce claims backlogs.

Performance Measures

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
1.3a: Provide uninterrupted access to our systems during scheduled times of operations	99.95% availability	99.84% availability	99.89% availability	99.96% availability	99.90% availability	**Met** 99.95% availability	99.90% availability	99.90% availability
	FY 2023 Performance Progress							
	Target Met: We exceeded our target of 99.90 percent and achieved 99.95 percent system availability in FY 2023 through expansion of automated alerting, advanced performance testing, and modernized deployments. This investment ensures our critical systems supporting retirement, disability, and telephone services; as well as external business services are available, stable, and secure for our users.							

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
1.3b: Modernize evidence acquisition systems to drive increased electronic medical evidence volumes through a multi-channel strategy	Acquired 51% of electronic medical evidence	Acquired 52% of electronic medical evidence	Acquired 53% of electronic medical evidence	Acquired 55% of electronic medical evidence	Acquire 56% of electronic medical evidence	**Not Met** 55%	57%	58%

FY 2023 Performance Progress

Target Not Met: While electronic channels, and Health Information Technology (HIT) specifically, had significant growth in FY 2023, we did not meet our target. We acquired 55 percent of our medical evidence electronically, which was 1 percent less than our 56 percent target.

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
1.3c: Improve customer service by addressing the number of actions pending at the processing centers	4.5 million	3.75 million	3.86 million	4.2 million	4.7 million	**Met** 4.56 million	5.05 million	5.3 million

FY 2023 Performance Progress

Target Met: We met our target of addressing the actions pending at the PCs in FY 2023 through the judicious use of overtime and the regular transfer of workloads across all eight PCs to maximize capacity. The number of actions pending at the PCs was approximately 4.6 million, below our target of 4.7 million.

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 systemic barriers present in hiring and advancement

Broaden reach for hiring and promote retention

FY 2023 Performance Measure Target and Results (see details)		
2.1a: Increase the use of workforce data analyses to support executive workforce and decision making	Release four new workforce planning and analysis resources	● **Met**

What Did We Accomplish in FY 2023?

We developed strategies to enhance our selection and retention process.

- Updated our Careers with SSA website announcing direct hiring authority allowing managers to directly recruit and hire candidates to fill critical positions, and added inclusive language in our job announcements in support of our DEIA Strategic Plan.
- Published our FYs 2023–2026 Human Capital Operating Plan (HCOP) to address retention and attrition challenges through Strategic Workforce Planning (SWP).
- Conducted a DEIA workforce analysis, including workforce representation, and projected changes to representation, trend data, and employee experience data.
- Implemented an agency-wide policy on prohibiting discrimination, including harassment, based on sexual orientation, gender identity, or gender expression.
- Updated employee engagement resources, including executive and manager toolkits enabling agency leaders to streamline workforce planning efforts and mitigate the impact of attrition.
- Implemented training and provided resources to support our current military veteran employees.
- Collaborated with the Department of Veterans Affairs to provide information sessions to all SSA employees on the Promise to Address Comprehensive Toxins Act and veterans' benefits.
- Developed a Veteran New Hires page on our Veterans Employee Terminal website that provides a checklist with links to financial resources and benefits available to veterans.
- Developed DEIA Training for Adjudicators for release in FY 2024.

What Do We Plan to Accomplish in FYs 2024 and 2025?

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

We will conduct analyses on hiring and employee advancement through our annual Management Directive 715 reporting process. We will implement changes in hiring and career advancement, particularly around training. We will review our workplace culture, as necessary, to further these commitments.

Enhance Strategic Workforce Planning: We are enhancing our SWP to ensure we effectively hire, develop, and retain a talented and diverse workforce. In FY 2024, we will update and expand our SWP strategies and business process to meet agency needs. We will monitor the HCOP implementation and adapt strategies as opportunities for innovative workplace improvements arise. We will also develop a comprehensive long-term strategy to identify and reduce skill and competency gaps within mission critical and leadership positions. In FY 2025, we will begin implementing a training plan to reduce leadership competency gaps. We will also expand SWP strategies to address occupation-specific competency assessment and development.

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. In FY 2024, we will release the Civil Rights and Diversity Empowerment Portal, a consolidated equal opportunity training site for our non-managers, managers, and equal employment opportunity (EEO) practitioners. We will implement DEIA strategies, policies, practices, and processes to identify and eliminate barriers in hiring and advancement. In FY 2025, we plan to enhance the Civil Rights and Diversity Empowerment Portal showcasing up-to-date EEO/DEIA trainings.

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 expanding manager recruitment capabilities, increasing internship opportunities, and utilizing Office of Personnel Management (OPM) special hiring

authorities (e.g., Schedule A, Pathways, Military Spouse). In FYs 2024 and 2025, we will utilize special hiring authorities, including direct hiring authority for approved mission-critical vacancies. We will leverage partnerships with over 400 universities and institutions that specifically work with underserved communities and provide guidance and program oversight for veteran hiring, training, and retention activities. We will increase the use of social media platforms as a recruitment tool for students, recent graduates, and direct hire applicants to attract top talent from anywhere in the country.

Foster Employee Retention: Our goal is to identify innovative strategies to engage our employees and foster retention. We will use a variety of human capital (HC) strategies to improve retention among current employees and new hires. In FYs 2024 and 2025, we will prioritize employee well-being by conducting mental health and wellness workshops and developing health and well-being tutorials. We will also expand workload and stress mitigation strategies by developing an employee engagement marketing plan that promotes employee health and well-being. This broad marketing campaign will introduce resources that encourages our employees to utilize our programs and support resources. We also plan to issue new employee retention and workload resources and leverage technology to improve workforce efficiency.

We are working to build a culture of recognition by providing employee recognition resources and best practices for our managers and supervisors. In addition, we are encouraging more frequent, timely, and informal recognition and acknowledgment of employee and group contributions, such as peer-to-peer awards. In FYs 2024 and 2025, we will develop and release an Employee Recognition Toolkit. We also plan to increase manager support and accountability by increasing soft skills training for supervisors and managers and implementing Improving Workforce Morale (IWM) plans.

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. In FY 2024, we will provide guidance and support for Senior Executive Service Candidate Development Program (SES CDP) graduates, as they begin the process to obtain OPM certification. In FY 2025, we will advertise the next cohort, make selections, and begin the SES CDP.

Long term Goal
• Increase workforce diversity through improved recruitment, hiring, and retention.
We are working towards our long-term goal of ensuring we attract and retain a talented and diverse workforce by training managers, administrative staff, and human resource (HR) specialists on recruitment strategies, merit promotion, hiring authorities, and workplace flexibilities.

Performance Measures

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
2.1a: Increase the use of workforce data analyses to support strategic workforce planning and decision making	Not available	Not available	Not available	Not available	Release four new workforce planning and analysis resources	**Met** Released four workforce planning and analysis resources	Release four new workforce planning and analysis resources	Release five new workforce planning and analysis resources
	FY 2023 Performance Progress							
	Target Met: We met our target in FY 2023 by releasing four workforce planning and analysis resources. These tools and resources focused on exercising inclusive decision-making, workload prioritization, knowledge sharing, and workforce projections.							

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 2023 Performance Measure Target and Results ([see details](#))		
2.2a: Improve employee engagement	Achieve a score of 76 on the Employee Engagement Index (Supervisor Subindex)	🔴 **Not 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	🟢 **Met**

What Did We Accomplish in FY 2023?

We focused on improving employee engagement and leadership development.

- Implemented mini-flash mentoring events for over 5,000 employees on career development, interpersonal skills, and soft skills with a 96 percent participant satisfaction rate.
- Launched the FY 2023 Traditional Mentoring Program with 400 mentees and hosted activities that included mentoring program guidance, action planning, and focus groups for program improvement.
- Commenced the second year of our Leadership Fundamentals curriculum for supervisors with over 1,000 participants, offering skill and career expansion via a series of developmental assignments.
- Provided career development information sessions on planning, interviewing, and resources to over 6,600 employees, and received a 95 percent participant satisfaction rating.
- Hosted Labor and Employee Relations (LER) training sessions for over 500 managers on addressing performance and conduct.
- Evaluated and implemented enhancements to the National Leadership Development Program (NLDP) application process to support prospective applicants during the assessment process.
- Hosted NLDP readiness sessions for employees nationwide as a tool to support the development of leadership competence across all levels of the organization.

What Do We Plan to Accomplish in FYs 2024 and 2025?

Strategy: Invest in our employees

We will modernize our talent management systems to support interactive and job-specific activities across the employee lifecycle, further supporting management accountability for improved employee performance and engagement.

Improve Employee Engagement: We employ tools that support executive and management development, including attrition and retention analysis, employee feedback surveys, and targeted IWM plans. We will implement our FYs 2024–2025 agency-level IWM plan, which serves as a roadmap for improvement in the areas of effective leadership, employee and manager development, effective communication, and DEIA. We hold meetings with senior executives, managers, supervisors, and employees to solicit thoughts and recommendations on new ideas to foster and improve engagement across the agency. We will partner with internal and external stakeholders to share information on engagement through the Employee Engagement Community of Practice. We will also develop and share agency-wide best practices, tools, and strategies to address employee engagement, employee career path resources, development opportunities, and workplace flexibilities.

Employee Engagement Index

FY	Employee Rating
FY 2019	72
FY 2020	75
FY 2021	76
FY 2022	75
FY 2023	74

FEVS Supervisor Subindex

Strengthen the Performance Management Process: We are equipping managers with the necessary tools to address potential and current performance and conduct matters through LER training. Training participants will compare their pre-and post-training knowledge scores to gauge their level of growth between assessments. In FYs 2024 and 2025, we plan to improve participants' scores across pre-and post-training assessments and achieve an average score of 85 percent on post-training assessments.

In FYs 2024 and 2025, we plan to update our secure electronic platform for employee documents, also known as e7B, to keep pace with changes to agency system and security policies, provide a more intuitive user experience for supervisors and employees, and improve supervisors' compliance with
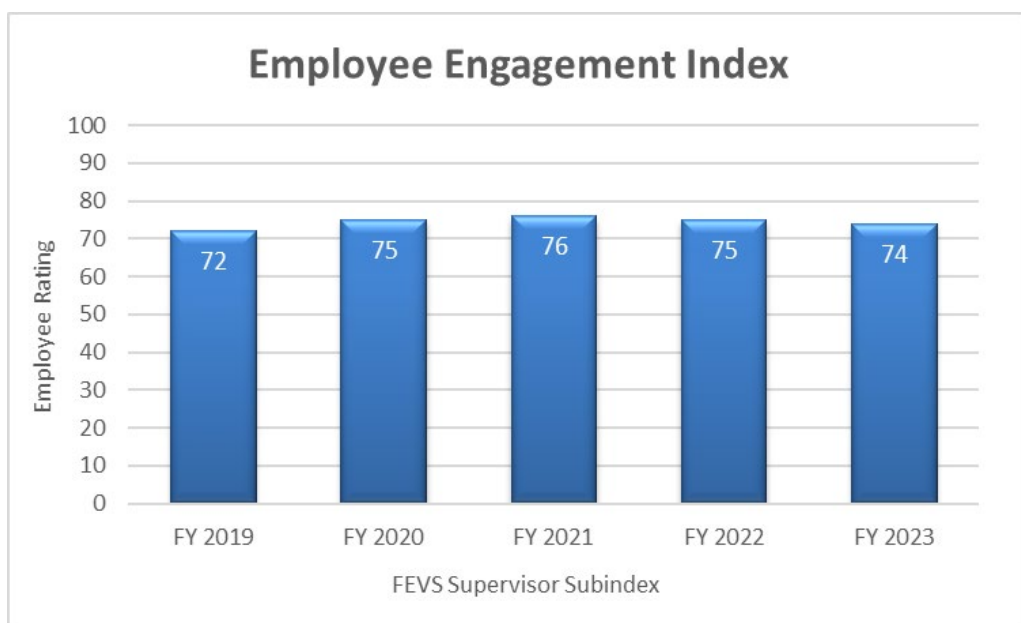
performance timelines. In FY 2025, we will replace the current performance application, fulfill the performance management program's business needs, and address mandated systems requirements.

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 developed 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. The curriculum includes personnel management, labor and employee relations, diversity in the workplace, performance management, and health and safety training. We also implemented our Management Minutes initiative to provide all agency managers and supervisors with a targeted series of tips, tools, and strategies to build and sustain an engaged workforce. In FY 2024, we will release the LF Years 3–5 curriculum, and in FY 2025, we will maintain and update the entire LF curriculum.

Ensure Equity in Leadership Development: We continually recruit from underrepresented groups to expand and diversify our applicant pools in leadership development programs. In FYs 2024 and 2025, we will announce NLDP offerings with several modifications, which will improve the application process and enhance the developmental experience. The 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. In addition, we plan to develop a more robust educational series, including a series designed to prepare prospective applicants for the SES CDP application process. We will also conduct public servant leadership training for SES and GS-15s. This training will encourage leaders to be aware of the need for flexibility in their management style to accommodate individual employee needs with the goal of enhancing our employee experience and boosting employee morale, engagement, and retention.

Long term Goals

- Increase employee engagement and empowerment as measured in the Federal Employee Viewpoint Survey.
- Expand and maximize leadership development opportunities to promote employee retention and strengthen succession planning.

We are making progress toward our long-term goals by supporting our employees with our employee engagement and leadership training resources.

Performance Measures

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
2.2a: Improve employee engagement	Achieved a score of 72 on the Employee Engagement Index (Supervisor subindex)	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)	Achieve a score of 77 on the Employee Engagement Index (Supervisor subindex)	**Not Met** Achieved a score of 74 on the Supervisor subindex	Achieve a score of 75 on the Employee Engagement Index (Supervisor subindex)	Achieve a score of 76 on the Employee Engagement Index (Supervisor subindex)
	FY 2023 Performance Progress							
	Target Not Met: We did not meet our FY 2023 target. However, we offered a variety of employee engagement resources to supervisors. We updated the Employee Engagement Suite with new supervisory resource materials, offered supervisory and leadership training, and released a bi-monthly management minutes e-mail series.							

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
2.2b: Ensure new supervisors receive timely leadership training	84% of supervisors enrolled within 90 days	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	At least 95% of new supervisors complete training within one year of the effective date of their supervisory appointment	**Met** 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	At least 95% of new supervisors complete training within one year of the effective date of their supervisory appointment
	FY 2023 Performance Progress							
	Target Met: Ninety-six percent of supervisors appointed in FY 2022 completed training within one year.							

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
2.2c: Strengthen manager accountability for effective performance management	Tracked 94% of performance documents through e7B	Tracked 96.5% of Employee acknowledgements through e7B	Tracked 98% of Employee acknowledgements through e7B	Tracked 96.3% of Employee acknowledgements through e7B	Track 96% of performance documents through e7B	**Met** Tracked 96% of performance documents through e7B	Track 96% of performance documents through e7B	Track 96% of performance documents through e7B
	FY 2023 Performance Progress							
	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

What Did We Accomplish in FY 2023?

Improving our payment accuracy and program integrity is a focus area for improvement.

- Mailed over 19,000 notices, informing beneficiaries who are potentially eligible for higher benefits based on their own earnings record. We mailed nearly 38,000 notices to surviving spouses who are potentially eligible for a higher surviving spouse benefit and 1,500 notices to beneficiaries who are potentially eligible for a higher surviving divorced spouse benefit due to the death of an ex-spouse.
- Released videos on YouTube, social media platforms, and in field offices explaining the importance of reporting wages and the various options that are available to report.
- Initiated migration of our iClaim fraud detection analytics to our Anti-Fraud Product Line.
- Initiated a reassessment of fraud risk in the disability program; completed the enumeration and debt management fraud risk assessments; and completed the Title II Retirement and Survivors Insurance fraud risk profile.
- Implemented multi-factor authentication for the mobile wage reporting application.

FY 2023 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)	**Results available in Summer 2024**
3.1b: Maintain a high payment accuracy rate by reducing overpayments, in the Old-Age, Survivors, and Disability Insurance Program	99.80% (O/P)	**Results available in Summer 2024**
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**

FY 2023 Performance Measure Target and Results		
3.1d: Maintain effective cybersecurity and privacy programs	Achieve 81 % on the CIO Federal Information Security Management Act (FISMA) Metrics Scorecard	🟢 **Met**

What Do We Plan to Accomplish in FYs 2024 and 2025?

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

Dedicated program integrity funding helps ensure individuals receive the benefits to which they are entitled and helps safeguard the integrity of benefit programs by confirming eligibility, preventing fraud, and improving payment accuracy for overpayments and underpayments. Program integrity funding allows us to conduct SSI redeterminations and continuing disability reviews, conduct the anti-fraud cooperative disability investigations program, and support special attorneys for criminal fraud prosecutions. We will continue these efforts to ensure public confidence in our programs and operations and to ensure we are providing beneficiaries the correct benefits to which they are entitled.

Modernize our Debt Management: Through this effort, we are working to provide beneficiaries with options for repaying debts and enable us to more effectively and efficiently post, track, collect, and report on overpayments. In FY 2023, we expanded and streamlined our automated remittance processing capabilities. In FY 2025, we will modernize systems to help address overpayments before they occur and modernize our debt management systems. We will also explore opportunities to advance modernization efforts in FY 2024.

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: We are enhancing our mobile wage reporting application to make it easier to report wages from mobile devices. In FYs 2024 and 2025, we will work to automate wages received from payroll data providers through the Payroll Information Exchange, refining the use of third-party data and reducing manual workloads.

Ensure Timely and Accurate Payments to Claimants and their Appointed Representatives: When fee agreements are in place between claimants and their representatives, 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, resulting in a 33 percent reduction in pending representative fee cases. In FYs 2024 and FY 2025, we will prioritize representative fee actions to ensure representative's entities can receive payment and issue claimant benefits.

Strategy: Expand the use of data analytics and predictive modeling

We will enhance our enterprise fraud risk management program by conducting additional risk assessments.

Enhance Fraud Prevention and Detection Activities: We are improving 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. In FY 2024, we plan to initiate a reassessment of fraud risk in eServices and administrative services; complete the disability program fraud risk re-assessment, enumeration and debt management fraud risk profiles; and update the Enterprise Fraud Risk Management Strategy. In FY 2025, we plan to initiate re-assessment of fraud risk in the Representative Payee and Title XVI programs and draft an Enterprise Fraud Risk profile that includes all fraud risk profiles completed for the first cycle of fraud risk assessments. Through FY 2025, we also plan to migrate our remaining eServices fraud detection analytics to the Anti-Fraud Product Line.

Strategy: Strengthen our cybersecurity program

We will strengthen the resilience of our cybersecurity program, which is critical to protecting the personally identifiable information 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 enhanced our security controls to address the risks inherent in our legacy applications by continuous monitoring, implementing a comprehensive integrity review process, and restricting employees' access to resources appropriate for their job function. We also developed privacy compliance and risk management role-based training (RBT) focused on privacy compliance and risk management.

In FY 2024, we plan to implement RBT for system security officers, security authorization managers, system owners, and project managers and develop privacy breach response and remediation RBT. In FYs 2024 and 2025, we plan to implement privacy breach response and remediation RBT for breach response coordinators. We will also collaborate with risk principals across the agency to mature and automate our privacy risk management framework. We plan to ensure privacy compliance requirements and risk are adequately documented and managed for information systems, applications, and programs that process personally identifiable information.

Long term Goal

- Improve the integrity of the Supplemental Security Income program by reducing overpayments and underpayments to ensure eligible individuals receive the benefits to which they are entitled.

We are working toward our long-term goal by updating our policies, guidance, and procedures to improve payment accuracy, fraud prevention, and cybersecurity.

Performance Measures

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
3.1a: Improve the integrity of the Supplemental Security Income Program by focusing our efforts on reducing overpayments	91.87% (O/P)	91.24% (O/P)	92.83% (O/P)	91.98% (O/P)	94.00% (O/P)	Available Summer 2024	94.00% (O/P)	94.00% (O/P)
	FY 2023 Performance Progress							
	FY 2023 results will be available in summer of 2024.							

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
3.1b: Maintain a high payment accuracy rate by reducing overpayments, in the Old-Age, Survivors, and Disability Insurance Program	99.80% (O/P)	99.83% (O/P)	99.83% (O/P)	99.49% (O/P)	99.80% (O/P)	Available Summer 2024	99.80% (O/P)	99.80% (O/P)
	FY 2023 Performance Progress							
	FY 2023 results will be available in summer of 2024.							

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
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	96% decisional accuracy	97% decisional accuracy	97% decisional accuracy	97% decisional accuracy	**Met** 97.5% decisional accuracy	97% decisional accuracy	97% decisional accuracy
	FY 2023 Performance Progress							
	Target Met: We exceeded our FY 2023 target, achieving 97.5 percent decisional accuracy rate for initial disability decisions.							

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
3.1d: Maintain effective cybersecurity and privacy programs	Managing Risk score achieved	Managing Risk score achieved	Managing Risk score achieved	Results not available	Achieve 81% on the CIO FISMA Metrics Scorecard	**Met** Achieved 96% on the CIO FISMA Metrics Scorecard	Achieve 90% on the CIO FISMA Metrics Scorecard	Achieve 90% on the CIO FISMA Metrics Scorecard
	FY 2023 Performance Progress							
	Target Met: We exceeded our FY 2023 target, achieving 96 percent on the CIO FISMA metrics scorecard. We allocate the appropriate effort and resources to the five CIO FISMA Scorecard metrics to improve the agency's cybersecurity posture.							

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 2023 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	**Results available in Spring of 2024**
3.2b: Increase funding for HBCUs and ISSCs	50% above the 4-year average	🟢 **Met**

What Did We Accomplish in FY 2023?

We focused on eliminating potential barriers to acquisition and grant opportunities.

- Announced the Interventional Cooperative Agreement Program (ICAP) funding opportunity to a list of 688 contacts, including a list of 180 HBCU and ISSC contacts and held two information sessions assisting applicants unfamiliar with the application process.
- Announced the Retirement and Disability Research Consortium (RDRC) funding opportunity to a list of 600 contacts, including HBCU and ISSC contacts.
- Announced the Analyzing Relationships between Disability, Retirement, and Work funding opportunity, to a list of 688 contacts, including 180 HBCU and ISSC contacts and held two information sessions. Also posted information on our Disability Research [website](#).
- Published the "Equity-Based Guidelines to Increase Access to and Encourage Participation in Grant Opportunities by HBCUs and ISSCs"
- Hosted an Industry Day with over 300 registered small business contractors to present upcoming IT modernization initiatives and associated contracting opportunities.
- Partnered with the SBA Procurement Center Representative to identify acquisitions to be set aside for the following small businesses: HUBZone, Disadvantaged, Women-Owned, Veteran-Owned, and Service Disabled.
- Updated our agency Procurement Forecast on a quarterly basis to give the vendor community, specifically small businesses, a more accurate and up-to-date account of our upcoming procurements.

What Do We Plan to Accomplish in FYs 2024 and 2025?

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

We will devise best practices to encourage participation by HBCUs and ISSCs, including direct communications with affinity-based professional associations through a ListServ we created and through information sessions targeted for HBCU and ISSC alumni on new competitive grant programs. We will develop best practices for Federal contracts to share 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. The RDRC, ICAP, and ARDRAW Request for Applications (RFA) now include an institutional diversity score allowing government evaluators to assign additional points in areas where aspects of the work will be performed by HBCUs. In FYs 2024 and 2025, we will continue to perform outreach at various HBCU and ISSC events and promote our research opportunities. We will also promote the use of small business set-asides for procurement to achieve our small business goals of 28 percent and small disadvantaged business goal of 13 percent for FY 2024, as negotiated with the Small Business Administration. This involves limiting competition for certain contracts to help provide equal opportunities for small businesses.

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

We are reaching out to HBCUs and ISSCs for feedback about our grantmaking process and potential barriers, which will inform our processes going forward. We are also reaching 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 created an HBCU and ISSC contact list to reach targeted research audiences and maintain open communication with the community of potential applicants. In FYs 2024 and 2025, we will continue to utilize the HBCU and ISSC contact list to notify the community of upcoming grant RFAs and information sessions.

Long term Goal

- Improve access to contracting and grant opportunities for underrepresented groups and research institutions serving people of color.

We are making progress toward our long-term goal through our efforts to identify potential barriers and taking steps to address them.

Performance Measures

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
3.2a: Achieve Small Business Administration annual scorecard success in contracting with HUBZone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses	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	Available Spring 2024	Achieve an overall grade of "A" on the SBA scorecard	Achieve an overall grade of "A" on the SBA scorecard
	FY 2023 Performance Progress							
	FY 2023 results will be available in spring 2024.							

Fiscal Year Performance	2019 Results[5]	2020 Results[5]	2021 Results[5]	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
3.2b: Increase funding for HBCUs and ISSCs[6]	$176,196	$62,686	$550,577	$608,896	50% above the 4-year average[7]	**Met** 100% above the 4-year average[6]	100% above the 4- year average[6]	105% above the 4- year average[6]

FY 2023 Performance Progress

Target Met: We exceeded our FY 2023 target of increasing funding for HBCUs and ISSCs by 50 percent above the 4-year average. In FY 2023, RDRC grants to HBCU and ISSC institutions and scholars totaled $735,000, which was more than double the 4-year average.

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[5] Figures for FYs 2019, 2020 and 2021 have been revised from the FYs 2022–2024 APR for clarity. The current figures are now in the performance fiscal year the funds are distributed in rather than the budgeted fiscal year when funding is awarded.

[6] Consistent with Executive Order 14041, *White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity Through Historically Black Colleges and Universities*, dated September 3, 2021.

[7] The "4-year average" benchmark period is based on performance in FYs 2019 to 2022, which is the period of increased Retirement and Disability Research Consortium outreach to HBCUs and ISSCs. FY 2023 is the first year we start to measure this performance indicator.

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 2023 Performance Measure Target and Results (see details)		
3.3a: Reduce our Real Property Footprint	Achieve a 70,000 USF reduction	● Met

What Did We Accomplish in FY 2023?

We partnered with other Federal agencies to share data and develop strategies to address government-wide initiatives.

- Began a robust regulatory agenda focusing on simplifying SSI, improving the disability adjudication process, updating medical listings, and reducing improper payments. In total, we published 10 Notices of Proposed Rulemaking (NPRM) and Final Rules in FY 2023 from this agenda. Refer to our website for more information.
- Leveraged partnerships with external organizations, including the Partnership for Public Service and other Federal agency Community of Practice, for government-wide planning efforts regarding the future of work.
- Worked strategically with external partners such as the National Association for Public Health Statistics and Information Systems and State Vital Statistic Agencies for our initiative to expand the collection of race and ethnicity data through EAB.
- Coordinated with DHS U.S. Citizenship and Immigration Services to fully automate issuance of SSN cards to refugees through our Enumeration Beyond Entry program. This change expedites SSN processing and prevents a visit to a field office.
- Collaborated with Department of Health and Human Services to publish a Fact Sheet on COVID/Long COVID: *A Guide for Health Professionals on Providing Medical Evidence for Social Security Disability* that was shared with the White House Domestic Policy Council.
- Developed a focused nonpublic facing useable square footage (USF) reduction plan which identifies our space reduction goals.

What Do We Plan to Accomplish in FYs 2024 and 2025?

Strategy: Simplify our policies and modernize our processes

We will 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: In FY 2024, we published an NPRM to reduce wage reporting burdens and improve payment accuracy, and we plan to publish three final rules to simplify In-Kind Support and Maintenance policies.

Improving the Disability Adjudication Process: In our NPRM, *Intermediate Improvement to the Disability Adjudication Process: Including How We Consider Past Work (SSA-2023-0024),* we proposed revising 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 proposed revising the definition of past relevant work (PRW) by reducing the relevant work period from 15 to 5 years. This change would 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. We are working on the final rule.

Update the Listing of Impairments: The Listing of Impairments describes disabling impairments for each of the major body systems. We consistently review these listings and make targeted updates as necessary and when the regulatory agenda allows to reflect advances in medical knowledge, emerging research, and stakeholder input.

Strategy: Strengthen program and resource management

We will 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 cultivated a mature organizational performance process based on our established routines to monitor our progress, respond to identified challenges, and foster a culture of evidence-based analysis and continuous improvement. We are building additional routines for measuring and monitoring our organizational health to improve our mission delivery and optimize our work environment. In FYs 2024 and 2025, we plan to establish a robust framework to measure and assess the organizational health of our agency. We also plan to increase organizational health indicators and incorporate them into our existing structure. We also plan to automate and improve performance management capabilities by implementing application programming interfaces to better retrieve employee information.

Reduce Our Real Property Footprint: We will reassess 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 continue to evaluate our real property requirements and pursue savings that we can reinvest to improve service.

Real Property Footprint Reduction

Legend: Annual Useable Square Footage — Cummulative Useable Square Footage
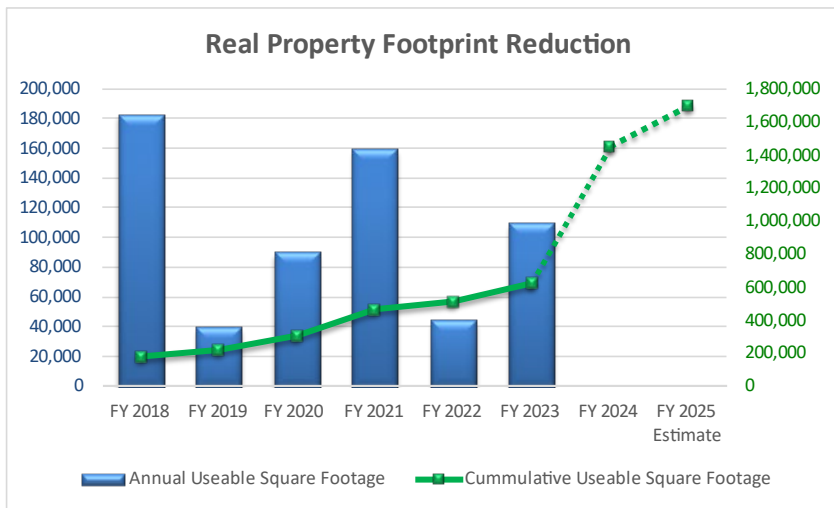
Strategy: Expand strategic partnerships with external partners

We will 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: We work 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 began collecting occupational data on a five-year cycle.

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 are implementing 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 hold quarterly Data Exchange Community of Practice meetings to expand our Federal and private sector partnerships. In FYs 2024 and 2025, we plan to expand our partnerships with other Federal agencies regarding HC and organizational priorities regarding the future of work, SWP, workforce analytics, and succession planning.

Long term Goals

- Improve customer experience and equity in our disability programs by continuously updating our medical criteria to reflect advances in medical knowledge.
- Increase our data exchange partners by expanding outreach efforts with the data exchange community of practice and the States' data exchange community of interest.

We are making progress toward our long-term goals through our efforts to update our policies, streamline our processes, and leverage our Federal and private sector partnerships to better serve our customers.

Performance Measures

Fiscal Year Performance	2019 Results	2020 Results	2021 Results	2022 Results	2023 Target	2023 Results	2024 Target	2025 Target
3.3a: Reduce our real property footprint	Achieved a 39,205 USF reduction	Achieved a 89,406 USF reduction	Achieved a 159,000 USF reduction	Achieve a 43,600 USF reduction	Achieve a 70,000 USF reduction	**Met** Achieved a 108,614 USF reduction	Achieve a 824,000 USF reduction	Achieve a 250,000 USF reduction
	FY 2023 Performance Progress							
	Target Met: We exceeded our FY 2023 target, reducing our real estate footprint by 108,614 USF.							

Budgeted Workload Measure

Workload Measures	FY 2019 Results	FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Estimated	FY 2025 Request
Retirement and Survivor Claims (includes Medicare)							
Retirement and Survivor Claims Completed	6,020,702	6,120,255	6,081,969	6,592,620	6,692,914	6,654,000	6,735,000
Disability Claims							
Initial Disability Claims Receipts	2,345,615	2,212,858	2,009,254	2,141,612	2,185,209	2,254,000	2,211,000
Initial Disability Claims Completed	2,310,057	2,037,356	2,011,298	1,882,540	1,973,641	2,205,000	2,390,000
Initial Disability Claims Pending	593,944	763,747	739,745	940,886	1,127,881	1,166,000	987,000
Average Processing Time for Initial Disability Claims (days)	120 days	131 days	165 days	184 days	218 days	230 days	215 days
Disability Reconsiderations							
Disability Reconsiderations Receipts	566,462	567,800	571,291	542,376	545,937	618,000	669,000
Disability Reconsiderations Completed	544,148	552,601	515,698	483,217	483,148	578,000	684,000
Disability Reconsiderations Pending	133,503	143,781	192,892	233,919	289,890	325,000	310,000
Average Processing Time for Disability Reconsiderations (days)	109 days	122 days	147 days	183 days	213 days	225 days	215 days

Workload Measures	FY 2019 Results	FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Estimated	FY 2025 Request
Hearings							
Hearings Receipts	510,901	428,810	382,870	356,666	355,565	395,000	475,000
Hearings Completed	793,863	585,918	451,046	362,864	377,685	435,000	425,000
Hearings Pending	575,421	418,313	350,137	343,939	321,819	282,000	332,000
Annual Average Processing Time for Hearings Decisions (days)[8]	506 days	386 days	326 days	337 days	450 days	345 days	270 days
National 800 Number							
National 800 Number Calls Handled[9]	33,496,515	34,480,132	34,499,955[10]	29,511,502[10]	29,535,675	31,000,000	32,000,000
Average Speed of Answer (minutes)[11]	20.4 minutes	16.1 minutes	13.5 minutes	32.7 minutes	35.8 minutes	32 minutes	12 minutes
Agent Busy Rate (percent)	14.1%	7.4%	0.2%	6.0%	8.3%	2%	1%

[8] Average processing time for hearings is an annual figure. In FY 2024, we plan to continue in-person hearings and prioritize individuals who have waited the longest for a hearing. Projections for the end of year monthly (September) processing time for hearings is 270 days for FY 2024 and 270 days for FY 2025.

[9] Volumes for FYs 2023–2025 include National 800 Number Calls Handled by automation. For FYs 2024–2025, we project about 4 million automated calls handled in each year.

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

[11] We will continue to evaluate the aspirational goal as the agency gains experience with its new phone system and monitors the impact of a current FY 2024 hiring freeze on the number of phone agents.

Workload Measures	FY 2019 Results	FY 2020 Results	FY 2021 Results	FY 2022 Results	FY 2023 Results	FY 2024 Estimated	FY 2025 Request
Program Integrity							
Periodic CDRs Completed	1,939,167	1,492,926	1,615,561	1,506,195	1,611,019	1,675,000	1,675,000
Full Medical CDRs Completed (included above)	713,156	463,264	510,510	590,206	550,197	575,000	575,000
SSI Non-Medical Redeterminations Completed	2,666,287	2,153,109	2,367,391	2,202,803	2,515,721	2,489,000	2,482,000
Selected Other Agency Workload Measures							
Social Security Numbers Completed	17,646,561	12,906,716	11,576,821	16,118,113	18,138,054	19,000,000	19,000,000
Annual Earnings Items Completed	288,089,658	288,748,604	277,359,601	293,568,628	304,177,795	312,000,000	313,000,000
Social Security Statements Issued[12]	11,347,689	19,285,438	11,977,451	16,118,113	14,871,940	11,000,000	15,000,000
Selected Production Workload Measures							
Disability Determination Services Production per Workyear	303	255	239	230	240	249	262
Office of Hearings Operations Production per Workyear	111	93	78	64	69	81	81

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[12] The Social Security Statements Issued measure includes paper statements only. It does not include electronic statements issued. In FY 2023, *my* Social Security users accessed their Social Security Statements 32.6 million times.

Challenges Identified by the Office of the Inspector General in FY 2023

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 implore to address the challenges identified by OIG and our leadership. Acronyms for the responsible components are listed in Appendix D, Summary of Key Management Officials' Responsibilities.

Manage Human Capital

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

Challenge: SSA needs to address and improve in-office visits and other service methods, such as telephone and online services.

Our strategic initiatives to address this challenge include:

- Ensure Equity and Improve Outreach;
- Establish 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;
- Addressing the Processing Center Backlog;
- Improving the Disability Adjudication Process; and
- Ensure Timely and Accurate Payments to Claimants and their Appointed Representatives.

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, 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; 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, DCHO, DCO, DCRDP, OCIO, and OIG

Challenge: SSA needs to address concerns related to the timely and accurate processing of disability related workloads, particularly initial disability claims, reconsiderations, hearings, and continuing disability reviews (CDR). Additionally, 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:

- Expand Equity and Improve Outreach;
- Enhance Online Appeals;
- Enhance Enterprise Scheduling System;
- Address Initial Disability Decision Wait Times;
- Expand Video Service Delivery;
- Enhance Disability Case Processing;
- Reduce the Hearings Backlog;
- Expand Access to Electronic Medical Evidence;
- Promote Timely Wage Reporting;
- Publish SSA/Administration Regulatory Priorities to Simplify SSI, Improve the Disability Adjudication Process, and Reduce Improper Payments;
- Update the Listing of Impairments; 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:

- Addressing 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.

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:

- Addressing 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, and OCIO

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.

Our 2023 CX Action Plan outlines seven CX actions that we will execute in FYs 2023 and 2024 to build our CX management capacity. We worked with CX industry experts to develop journey mapping standards and 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. We designated three HISP priority services: applying for a replacement Social Security card, filing for Social Security retirement benefits, and obtaining adult disability benefits. Visit Performance.gov for more information about our CX Action Plans and our FY 2025 Congressional Justification for more specifics about our planned actions.

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. The most recent survey was completed in FY 2023.

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 2022, with customers awarded retirement benefits in April 2022. The sample included applicants who filed in person, by telephone, and online. We conducted the survey by mail from May through mid-August 2022. The results reflect the opinions of 5,468 respondents.

The purpose of the survey was to determine how well Social Security served its customers when they filed their application for retirement benefits. The survey also included questions to determine how the COVID-19 pandemic may have affected their decision on when and how to file for retirement benefits. We offer the following takeaways from the FY 2022 RAS Report compared with the RAS Report conducted with customers in February 2020:

- Almost all respondents in FY 2022 filed their applications for retirement benefits online or over the telephone. However, one out of every three respondents said they would have preferred to file in person.
- More respondents who said they do not use the Internet filed online anyway.
- More respondents said they called Social Security about their application for retirement benefits.
- Fewer respondents visited an office about their application for retirement.
- Almost half of respondents indicated they stopped working after the pandemic was officially declared.
- Most respondents said the pandemic had no effect on when they filed for their retirement benefits.
- More than half of the respondents who visited a local office without an appointment still received service.

Office Visitor Survey (Ad Hoc)

The Office Visitor Survey (OVS) measures customer satisfaction with the agency's in-person service in field offices and hearing offices. We conducted the surveys annually until FY 2018, then moved to a biennial schedule, and then to an "as needed" schedule for future iterations of the survey. Our last biennial survey was conducted in January 2020.

In July 2022 and again in January 2023, we conducted an OVS to assist the agency's re-entry evaluation by examining in-person service in offices after re-entry, which began in April 2022. Customer satisfaction with in-office service remained high and improved in some features of service during re-entry. The following table displays key comparison data of in-office service during pre-pandemic and re-entry periods.

	January 2023	July 2022	January 2020
Rating of Overall Satisfaction with Service	92% Excellent/Very Good/Good (E/VG/G)	92% E/VG/G	93% E/VG/G
Business Resolution	89%[a] accomplished their goal during visit	89%[a] accomplished their goal during visit	79% accomplished their goal during visit
Rating of Wait Time	83%[a] E/VG/G	83%[a] E/VG/G	78% E/VG/G
Length of Wait	73% waited 30 minutes or less	72% waited 30 minutes or less	69% waited 30 minutes or less
Rating of Office Comfort	93%[a] E/VG/G	94%[a] E/VG/G	87% E/VG/G
Rating of Interview Privacy	87%[a, b] E/VG/G	92%[a] E/VG/G	81% E/VG/G
Did interaction increase confidence in SSA in-person service?	89%[a] Yes	88%[a] Yes	84% Yes

[a] Statistically significant difference compared to January 2020
[b] Statistically significant difference compared to July 2022

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 (see our webpage for the reports). 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.[13] We also recently published a paper assessing the TTW evaluation findings to date and providing new results on TTW outcomes relative to costs.[14]

In FY 2023, we awarded a contract for a new formal evaluation of the TTW program. The evaluation will focus on identifying the underlying reasons for disparities in program successfulness among beneficiaries. 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. Interim reports will be completed beginning in FY 2026. The evaluation, along with final reports and datasets, will be completed in FY 2027.

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 HC areas: recruitment, development, performance culture, leadership, job satisfaction, and personal work experiences. The 2023 FEVS results indicated both strengths and opportunities for improvement. The results revealed that questions with the highest positive responses show employees feel they are held accountable for achieving results and producing quality work, are treated with respect by their supervisors, believe that through their work they contribute to the common good, and feel the agency prepares them for potential cybersecurity threats. The 2023 survey results indicate that performance recognition is a persistent challenge and represents an opportunity for improvement. Questions concerning reasonable workloads, performance-based recognition, involvement of employees in decisions that affect their work, and perceptions of senior leaders' ability to generate motivation and commitment in the workforce represent the lowest positive responses.

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

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[13] 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.

[14] 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 .

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:
   o 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.
   o Operationalizes goals of the government-wide and agency DEIA Strategic Plans.
   o Supports OMB Memorandum M-17-22, *Comprehensive Plan for Reforming the Federal Government and Reducing the Federal Civilian Workforce*.

2) HRStat – Metric-based, analytical monitoring process that tracks HC priorities and supports leadership data-driven decision making, as related to agency goals and performance improvement strategies:
   o Tracks agency progress on HCOP activities, along with other data-based strategic HC and workforce planning activities.
   o 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.
   o 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.
   o Conducted one audit in FY 2023 and found no significant issues (i.e., no illegal appointments or veterans' preference and adjudication issues).
   o Effective April 2023, the 10 regional SPOs were centralized under the office of HR. We are working with OPM to determine the HCF audits for FYs 2024–2025.

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. The FY 2023 HCR discussion with OPM took place on May 18, 2023.

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*.

In FY 2023, 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 and shared a copy of the FY 2023 Barrier Analysis Findings 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" issued in the fourth quarter of FY 2023. 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, after revising the ADR policy to increase management participation in ADR by requiring managers to get Deputy Commissioner-level concurrence to decline ADR. 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 participation in the ADR process. In FY 2023, the management participation in ADR was 92.4 percent, exceeding the EEOC's benchmark of 90 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) Allowing employees to initiate EEO complaints and to view the status of their cases electronically (*eFile*).

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. Creating 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.

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 2023, we successfully implemented 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 provide 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 (EDR) 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 are building onto the existing Identity, Credential, and Access Management strategy to target key requirements to enable agency-wide MFA at the application and system level in compliance with EO 14028, *Improving the Nation's Cybersecurity*.

Pre-Effectuation Review of Disability Determinations (Annually)

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

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. We are working with our IRS stakeholders to develop an approach for reviewing and testing agency systems.

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 2023 report was signed on March 31, 2023. At the end of 2022, the OASDI program was providing benefit payments to about 66 million people: 51 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 181 million people had earnings covered by Social Security and paid payroll taxes on those earnings. The total cost of the program in 2022 was $1,244 billion, while total income was $1,222 billion. The combined OASI and DI Trust Fund reserves are projected to reach reserve depletion in 2034, at which time continuing income to the trust funds would be sufficient to pay 80 percent of scheduled benefits. For the 75-year projection period, the OASDI actuarial deficit is 3.61 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.

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.

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.

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 2023, 7.4 million individuals received monthly Federal SSI payments averaging $654, a decrease of about 136,000 recipients from the 7.6 million recipients with an average payment of $603 in January 2022. By 2047, the end of the 25-year projection period, we estimate that the SSI recipient population will reach 8.3 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 SSN 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 to identify work CDR cases. WorkSmart consists of three systems of computer programs that identify and prioritize 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 and prioritizing 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 2024.

Targeted Denial Review (Annually)

We assess the accuracy of reconsideration disability denials made by the DDS. In FY 2023, we analyzed 25,411 cases and cited 1,100 decisional errors and 2,875 documentation errors. We returned 3,975 cases to the adjudicating components for correction—a return rate of 15.6 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 2022, defined as the percentages of dollars paid that are free of either an overpayment (O/P) or any underpayment (U/P), were 99.49 percent for O/P and 99.86 percent for U/P based on random sampling. In FY 2021, the O/P accuracy rate was 99.83 percent and 99.95 percent for U/P. The difference between the FY 2022 O/P and U/P accuracy rate and FY 2021 O/P and U/P accuracy rate was not statistically significant.

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.

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. The results of the FY 2023 report will be available in FY 2024.

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 2022, a sample of 4,197 cases provided meaningful information about the quality of the non-

medical aspects of these SSI transactions. The national case accuracy rates for FY 2022, defined as the percentage of cases free of either an O/P or a U/P, were 92.8 percent for O/P and 94.0 percent for U/P. In FY 2021, these rates were 92.8 percent and 94.3 percent, respectively. The change in the FY 2022 O/P and U/P case accuracy rates from those of FY 2021 was 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 2022 were 99.1 percent for O/P and 99.3 percent for U/P. In FY 2021, these rates were 99.1 percent and 99.4 percent, respectively. The change in the FY 2022 O/P dollar accuracy rate from the FY 2021 rate is not statistically significant. The results of the FY 2023 review will be available in FY 2024.

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 2020, the overall OASDI O/P case accuracy was 99.3 percent, and the overall OASDI U/P case accuracy was 98.3 percent. The case accuracy rates indicate that approximately 2-out-of-every 100 claims were incorrectly paid—about 0.7 out of 100 cases had O/Ps, and about 1.7 out of 100 cases had U/Ps. The OASDI national dollar accuracy rates for FY 2020 were 99.4 percent for O/Ps and 98.5 percent for U/Ps. The results of the FY 2023 study will be available in the third quarter of FY 2024.

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 consistency 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 2023 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 2023 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 2023 audit report marked the 30th 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 controls 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:
Changes to Performance Measures

Results for Discontinued Fiscal Year 2023 Performance Measures

Fiscal Year Performance	2019 Result	2020 Result	2021 Result	2022 Result	2023 Target	2023 Result
Expand video service delivery	Not available	Not available	Implemented MS Teams to 100% of frontline employees	On hold due to software implementation restrictions	Conduct test with Department of Homeland Security (DHS) to issue non-U.S. Citizen replacement cards	**Not Met** Pending approval and signature with DHS
	FY 2023 Performance Progress					
	Target Not Met: We did not meet our target to expand the use of video service delivery for other workloads. In FY 2023, we successfully conducted 2,541 MS Teams video appointments for U.S. Citizen no-change replacement SSN cards. We are working with DHS to issue non-U.S. Citizen replacement cards.					

Fiscal Year Performance	2019 Result	2020 Result	2021 Result	2022 Result	2023 Target	2023 Result
Enhance the leadership and executive pipelines through modernized national leadership and executive development programs	NLDP Launch Complete	NLDP Competencies Identified	NLDP Assignments Initiated	90% of NLDP participants reduced competency gaps	Implement 50% of NLDP improvements based on program evaluation feedback	**Met** Implemented 67% of NLDP improvement based on program evaluation feedback
	FY 2023 Performance Progress					
	Target Met: We met our target to implement 50 percent of NLDP improvements based on program evaluation feedback. We implemented 67 percent of NLDP improvements recommendations.					

Fiscal Year Performance	2019 Result	2020 Result	2021 Result	2022 Result	2023 Target	2023 Result
Modernize our Debt Management System	Developed the initial release of an online remittance application, which provides individuals with the ability to access a payment portal and make payments via the Department of the Treasury's Pay.gov website	Delayed the implement-ation of the online remittance (iPaySSA) application while we reassessed potential risks	Deployed the new online payment process	Expanded the Social Security Electronic Remittance System	Expand our automated remittance processing capabilities	**Met** Successfully expanded the Lockbox service to include SSI remittances

FY 2023 Performance Progress

Target Met: We met our FY 2023 target to expand our automated remittance processing capabilities. We expanded the use of lockbox services to include SSI remittances. In FY 2023, Lockbox processed over 215,000 remittances for $54 million.

Fiscal Year Performance	2019 Result	2020 Result	2021 Result	2022 Result	2023 Target	2023 Result
Ensure Timely and Accurate Payments to Appointed Representatives	Achieved an average processing time of 55.2 days	Achieved an average processing time of 65.9 days	Achieved an average processing time of 60.6 days	Achieved an average processing time of 71.5 days	Achieve an average processing time of 60 days	**Met** Achieved an average processing time of 45 days

FY 2023 Performance Progress

Target Met: We met the FY 2023 target through the prioritization of issuing appointed representative fees within the processing centers. We achieved an average processing time of 45 days, which is an improvement of about 26 days on average compared to FY 2022.

Fiscal Year 2023 Performance Measures with Title Changes

Previous Title	Current Title
1.3c: Improve customer service by reducing the number of actions pending at the processing centers	**1.3c: Improve customer service by addressing the number of actions pending at the processing centers**
2.1b: Increase the use of workforce data analyses to support executive workforce and succession planning and data-driven decision making	**2.1a: Increase the use of workforce data analyses to support strategic workforce planning and decision making**
2.2b: Ensure new supervisors receive timely training to improve their leadership skills and competencies	**2.2b: Ensure new supervisors receive timely leadership training**

Appendix D:
Summary of Key Management Officials' Responsibilities

Commissioner of Social Security (COSS) manages all agency programs and staff and serves as the Chief Operating Officer, responsible for improving agency management and performance.

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

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.

Office of Transformation (OT) 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 Chief Business Office and 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*.

Office of the Chief Information Officer (OCIO) 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.