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APPROPRIATION LANGUAGE/BACKGROUND

AUTHORIZING LEGISLATION

The Limitation on Administrative Expenses (LAE) account is authorized by section 201(g) of the Social Security Act. The authorization language makes available for expenditure, out of any or all of the Trust Funds, such amounts as Congress deems appropriate for administering Title II, Title VIII, Title XVI, and Title XVIII of the Social Security Act for which we are responsible and Title XVIII of the Act for which the Secretary of the Department of Health and Human Services is responsible.

Table 3.1—Authorizing Legislation
(Dollars in thousands)

	2025 Amount Authorized	2025 Enacted[1,2]	2026 Amount Authorized	2026 Enacted[3,4]	2027 Amount Authorized	2027 Estimate[5,6]
Title II, Section 201(g)(1) of the Social Security Act	Indefinite	$14,298,978	Indefinite	$14,842,978	Indefinite	$14,868,978

[1] Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4). The total includes $1,903,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and a $1,630,000,000 cap adjustment to remain available for 18 months through March 31, 2026. P.L. 119-4 allows us to transfer up to $15,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units.

[2] The total also includes $170,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[3] Consolidated Appropriations Act, 2026 (P.L. 119-75). The total includes $2,397,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and a $2,124,000,000 allocation adjustment to remain available for 18 months through March 31, 2027. P.L. 119-75 allows us to transfer up to $24,600,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units.

[4] The total also includes $170,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[5] The FY 2027 Budget proposes $2,397,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and a $2,124,000,000 allocation adjustment, to remain available until March 31, 2028. The Budget proposes transferring $25,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units.

[6] The total includes up to $175,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

APPROPRIATION LANGUAGE

For necessary expenses, including the hire and purchase of two passenger motor vehicles, and not to exceed $20,000 for official reception and representation expenses, not more than $14,692,978,000 may be expended, as authorized by section 201(g)(1) of the Social Security Act, from any one or all of the trust funds referred to in such section: Provided, That unobligated balances of funds provided under this paragraph at the end of fiscal year 2027 not needed for fiscal year 2027 shall remain available until expended to invest in the Social Security Administration information technology and telecommunications hardware and software infrastructure, including related equipment and non-payroll administrative expenses associated solely with this information technology and telecommunications infrastructure: Provided further, That the Commissioner of Social Security shall notify the Committees on Appropriations of the House of Representatives and the Senate prior to making unobligated balances available under the authority in the previous proviso: Provided further, That reimbursement to the trust funds under this heading for expenditures for official time for employees of the Social Security Administration pursuant to 5 U.S.C. 7131, and for facilities or support services for labor organizations pursuant to policies, regulations, or procedures referred to in section 7135(b) of such title shall be made by the Secretary of the Treasury, with interest, from amounts in the general fund not otherwise appropriated, as soon as possible after such expenditures are made.

From funds provided under the first paragraph under this heading, not more than $2,397,000,000, to remain available through March 31, 2028, is for the costs associated with continuing disability reviews under titles II and XVI of the Social Security Act, including work-related continuing disability reviews to determine whether earnings derived from services

demonstrate an individual's ability to engage in substantial gainful activity, for the cost associated with conducting redeterminations of eligibility under title XVI of the Social Security Act, for the cost of co-operative disability investigation units, and for the cost associated with the prosecution of fraud in the programs and operations of the Social Security Administration by Special Assistant United States Attorneys: Provided, That, of such amount, $273,000,000 is provided to meet the terms of a concurrent resolution on the budget and $2,124,000,000 is additional new budget authority specified for purposes of a concurrent resolution on the budget: Provided further, That, of the additional new budget authority described in the preceding proviso, $25,100,000 shall be transferred to the "Office of Inspector General", Social Security Administration, for the cost of jointly operated co-operative disability investigation units: Provided further, That such transfer authority is in addition to any other transfer authority provided by law: Provided further, That the Commissioner shall provide to the Congress (at the conclusion of the fiscal year) a report on the obligation and expenditure of these funds, similar to the reports that were required by section 103(d)(2) of Public Law 104-121 for fiscal years 1996 through 2002: Provided further, That none of the funds described in this paragraph shall be available for transfer or reprogramming except as specified in this paragraph.

In addition, $175,000,000 to be derived from administration fees in excess of $5.00 per supplementary payment collected pursuant to section 1616(d) of the Social Security Act or section 212(b)(3) of Public Law 93-66, which shall remain available until expended: Provided, That to the extent that the amounts collected pursuant to such sections in fiscal year 2027 exceed $175,000,000, the amounts shall be available in fiscal year 2028 only to the extent provided in advance in appropriations Acts.

Limitation on Administrative Expenses

In addition, up to $1,000,000 to be derived from fees collected pursuant to section 303(c) of the Social Security Protection Act, which shall remain available until expended.

Note—This account is operating under the Consolidated Appropriations Act, 2026 (Division D of Public Law 119-75).

LANGUAGE ANALYSIS

The Limitation on Administrative Expenses (LAE) appropriation language for FY 2027 provides SSA with $14,868,978,000 to administer the Old Age and Survivors Insurance (OASI), Disability Insurance (DI), and Supplemental Security Income (SSI) programs, and to support the Centers for Medicare & Medicaid Services (CMS) in administering their programs. The LAE account receives funding from the OASI, DI, and Medicare trust funds for their shares of administrative expenses, from the General Fund of the Treasury for the SSI program's share of administrative expenses, and through applicable user fees. The language provides the limitation on the amounts that may be expended from these separate sources for our administrative expenses.

The American public depends on SSA to deliver timely and accurate Social Security services. Our FY 2027 request allows us to carry over unobligated balances for non-payroll automation and telecommunications investment costs in future fiscal years, enabling us to enhance our technology to improve customer service and reduce customer wait times.

SSA has a responsibility to safeguard the integrity of benefit programs. For FY 2027, we are requesting a total of $2,397,000,000 in dedicated program integrity funding. This includes funding for full medical Continuing Disability Reviews (CDR), SSI non-medical redeterminations of eligibility (redeterminations), work-related CDRs, CDR appeals workloads, cooperative disability investigation (CDI) units, and fraud prosecutions by Special Assistant United States Attorneys (SAUSAs). Our FY 2027 program integrity request is comprised of $273,000,000 in base funding to meet the terms of a concurrent resolution on the budget, and a $2,124,000,000 adjustment. In FY 2027, SSA may transfer up to $25,100,000 from the adjustment funds to the Office of Inspector General (OIG) for the costs associated with jointly operated CDI units, which is an authorized use of the adjustment.

In addition to the appropriated amounts, we request authority to spend up to $175,000,000 in SSI State Supplement user fees and up to $1,000,000 in non-attorney representative fees.

These funding requests will help SSA continue to deliver high-quality service and maintain the integrity of its programs.

Table 3.2—Appropriation Language Analysis

Language Provision	Explanation
"For necessary expenses, including the hire and purchase of two passenger motor vehicles, and not to exceed $20,000 for official reception and representation expenses, not more than $14,692,978,000 may be expended, as authorized by section 201(g)(1) of the Social Security Act, from any one or all of the trust funds referred to in such section:"	The language allows us to rent or purchase two passenger vehicles for official use and limits spending for hosted events or gatherings intended to promote the agency's mission to distinguished guests to no more than $20,000. It also provides the annual appropriation for program administration, financed from the Social Security and Medicare trust funds and the General fund in

Language Provision	Explanation
	accordance with section 201(g) of the Social Security Act.
"Provided, That unobligated balances of funds provided under this paragraph at the end of fiscal year 2027 not needed for fiscal year 2027 shall remain available until expended to invest in the Social Security Administration information technology and telecommunications hardware and software infrastructure, including related equipment and non-payroll administrative expenses associated solely with this information technology and telecommunications infrastructure: Provided further, That the Commissioner of Social Security shall notify the Committees on Appropriations of the House of Representatives and the Senate prior to making unobligated balances available under the authority in the previous proviso:"	The language allows us to carryover unobligated balances for non-payroll automation and telecommunications investment costs in future fiscal years.
"Provided further, That reimbursement to the trust funds under this heading for expenditures for official time for employees of the Social Security Administration pursuant to 5 U.S.C. 7131, and for facilities or support services for labor organizations pursuant to policies, regulations, or procedures referred to in section 7135(b) of such title shall be made by the Secretary of the Treasury, with interest, from amounts in the general fund not otherwise appropriated, as soon as possible after such expenditures are made."	The language provides that the general fund of the United States Treasury will reimburse the Social Security trust funds, with interest, for the portion of official expenses attributable to the trust funds.
"From funds provided under the first paragraph under this heading, not more than $2,397,000,000, to remain available through March 31, 2028, is for the costs associated with continuing disability reviews under titles II and XVI of the Social Security Act, including work-related continuing disability reviews to determine whether earnings derived from services demonstrate an individual's ability to engage in substantial	The language appropriates $2,397,000,000 for dedicated program integrity funding, to remain available through March 31, 2028, for full medical CDRs, redeterminations, work-related CDRs, CDI units, and fraud prosecutions by SAUSAs. The language transfers $25,100,000 from the program integrity adjustment to the OIG to fund CDI unit activities. Additionally, this language prohibits the transfer or reprogramming of

Language Provision	Explanation
gainful activity, for the cost associated with conducting redeterminations of eligibility under title XVI of the Social Security Act, for the cost of co-operative disability investigation units, and for the cost associated with the prosecution of fraud in the programs and operations of the Social Security Administration by Special Assistant United States Attorneys: Provided, That, of such amount, $273,000,000 is provided to meet the terms of a concurrent resolution on the budget and $2,124,000,000 is additional new budget authority specified for purposes of a concurrent resolution on the budget: Provided further, That, of the additional new budget authority described in the preceding proviso, $25,100,000 shall be transferred to the "Office of Inspector General", Social Security Administration, for the cost of jointly operated co-operative disability investigation units: Provided further, That such transfer authority is in addition to any other transfer authority provided by law: Provided further, That the Commissioner shall provide to the Congress (at the conclusion of the fiscal year) a report on the obligation and expenditure of these funds, similar to the reports that were required by section 103(d)(2) of Public Law 104-121 for fiscal years 1996 through 2002: Provided further, That none of the funds described in this paragraph shall be available for transfer or reprogramming except as specified in this paragraph."	program integrity funding, except for the $25,100,000 transfer to OIG. For additional information, please refer to the Program Integrity section.
"In addition, $175,000,000 to be derived from administration fees in excess of $5.00 per supplementary payment collected pursuant to section 1616(d) of the Social Security Act or section 212(b)(3) of Public Law 93-66, which shall remain available until expended: Provided, That to the extent that the amounts collected pursuant to such sections in fiscal year 2027 exceed $175,000,000, the amounts shall be available	The language makes available up to $175,000,000 collected from States for administration of their supplementary payments to the SSI program. This assumes the fee will increase from $15.63 per check in FY 2026 to $16.05 in FY 2027 according to increases established by statute. We receive the amount collected above $5.00 from each fee.

Limitation on Administrative Expenses

Language Provision	Explanation
in fiscal year 2028 only to the extent provided in advance in appropriations Acts."	
"In addition, up to $1,000,000 to be derived from fees collected pursuant to section 303(c) of the Social Security Protection Act, which shall remain available until expended."	The language provides for the use of up to $1,000,000 derived from fees charged to non-attorneys who apply for certification to represent claimants.

SIGNIFICANT ITEMS IN APPROPRIATIONS COMMITTEE REPORTS

The tables below include the significant items included in House Report 119-271, Senate Report 119-55, and the joint explanatory statement accompanying the Consolidated Appropriations Act, 2026 (P.L. 119-75).

Table 3.3—House Report 119-271 for H.R. 5304, *Departments of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Act, 2026*

House Committee Report Item	Action Taken or To Be Taken
Occupational Information System (OIS) The Committee continues to direct SSA to include information in its Congressional Justifications detailing efforts to fully implement the OIS project, including the status of implementation and timeline for transitioning entirely to OIS, an action plan to accomplish such timeline, and the costs associated with the project.	Please refer to the Research and Demonstration exhibit in the Supplemental Security Income (SSI) Program section of this Congressional Justification.
Payment Integrity The Committee understands the importance of maintaining accurate records and delivering timely and reliable benefits to those who qualify. The Committee directs SSA to submit a report to the Committees on Appropriations of the House of Representatives and the Senate within 180 days of the enactment of this Act detailing the steps the agency is taking to improve the timeliness and efficiency of its error correction processes. The report should include any ongoing or planned improvements to internal review systems, how the agency informs the applicant of an error, staffing and training initiatives, and what improvements the agency has taken to avoid prolonged delays resulting from such errors.	We will provide the report by the requested due date.
Report on Limitation on Administrative Expenses (LAE) Expenditures The Committee continues to request that the data referenced under this heading in House Report 114–699 be included in future Congressional Justifications. In addition, the Committee requests the fiscal year (FY) 2027 Congressional Justification include a historical table of costs and FY 2027 requests for	Please refer to the following tables provided in the LAE section of this Congressional Justification that satisfies this request. • Historical table of costs and FY 2027 requests for personnel and benefits by major SSA component are included in Table 3.20, Table 3.21, and Table 3.22.

House Committee Report Item	Action Taken or To Be Taken
personnel and benefits, by major SSA component to include Operations (field offices, teleservice centers, processing centers, and regional offices); Office of Hearings Operations; Systems; Office of Analytics, Review, and Oversight; and Headquarters.	• Information technology costs broken out by hardware/software technology and upgrade/maintenance costs are included in Table 3.29 of the Information Technology exhibit included in the Limitation on Administrative Expenses (LAE) section of the Congressional Justification. • Physical infrastructure costs by region and office function, please see Tables 3.31 and Table 3.32. • Overall costs for personnel, time and dollars for Old-Age and Survivors Insurance (OASI), Disability Insurance (DI), and Supplemental Security Income (SSI), and other SSA missions are included in Table 3.14. • Program integrity work broken out by OASI, DI and SSI as well as types of spending are included in Table 3.26. • Disability Determination Services (DDS) State costs and Federal staff costs are included in Table 3.19.
Social Security Administration Technology Development The Committee urges SSA to consider the delays faced by individuals who apply for Social Security Disability Insurance (SSDI) and are waiting for their initial determination. The Committee urges SSA to explore and expand process changes that lead to faster determinations for applicants. The Committee also urges SSA to allocate adequate resources to the development of new technology that will relieve burdens on disability adjudicators and other personnel who play a role in preparing, evaluating, or finalizing initial determinations for SSDI applications. The Committee directs SSA to provide an update in the FY 2027 Congressional Justification detailing specific procedures, staffing strategies, technology investments, and planned process improvements to reduce the backlog of disability claims.	Please refer to the Budget Overview section and the Information Technology exhibit in the LAE section of this Congressional Justification that satisfies this requirement.

House Committee Report Item	Action Taken or To Be Taken
Social Security Program Integrity The Committee supports continued efforts to strengthen SSA's program integrity efforts in the SSDI and SSI benefit programs. Section 824 of the Bipartisan Budget Act of 2015 authorized SSA to enter into an information exchange with payroll data providers. There has been considerable success in reducing improper payments and leveraging technology to assist with beneficiary reporting requirements for other Federal and State benefit programs, and the Committee urges SSA to prioritize opportunities to do so for the SSDI and SSI benefit programs. Within the funds provided to SSA for enhancing beneficiary service delivery, the Committee urges SSA to use all the available tools provided by commercial entities that collect and maintain data regarding employment and wages to ensure that SSDI and SSI benefits are properly paid and to strengthen program integrity. In addition, the Committee encourages SSA to proceed expeditiously to implement system requirements and integrate the program for all beneficiaries throughout the agency. Further, the Committee requests SSA provide an update in its FY 2027 Congressional Justification regarding the status and progress of the payroll information exchange.	Please refer to the Beneficiary Services exhibit in the SSI section and the Improper Payment and Anti-Fraud exhibit in the LAE section of this Congressional Justification that satisfies this requirement.
Customer Experience The Committee continues to support efforts to improve agency customer experience. The Committee urges all agencies funded by this Act to develop standards to improve customer experience and incorporate the standards into the performance plans required under 31 U.S.C. 1115. The Committee requests an update from all agencies funded by this Act to report on their implementation plans regarding this subject in the FY 2027 Congressional Justification.	Please refer to the Budget Overview section of this Congressional Justification that satisfies this request.

House Committee Report Item	Action Taken or To Be Taken
Performance Reporting As part of the Congressional Justification for FY 2026 [2027], each department or agency funded by this Act is directed to include the percentage of the Senior Executive Service for each performance level (5—outstanding, 4—exceeds fully successful, 3—fully successful, 2—minimally satisfactory, or 1—unsatisfactory). In addition, the department or agency shall include in such justification the total amount spent on performance awards for the Senior Executive Service for the most recent fiscal year for which data is available.	Please refer to the Senior Executive Service Performance Reporting exhibit in the LAE section of this Congressional Justification that satisfies this requirement.

Table 3.4—Senate Report 199-55 for S. 2587, *Department of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Bills, 2026*

Senate Committee Report Item	Action taken or To Be Taken
Beneficiary Information on Claims Timing The Committee is concerned many retiring beneficiaries make their claiming decision without a full understanding of the financial implications of benefit reductions for early retirement or delayed retirement credits. The Committee requests a report in the FY 2027 Congressional Justification describing SSA's protocols, operating procedures, and informational materials (including nomenclature) used to inform retiring beneficiaries of how changes in their claiming date may affect their monthly benefit after claiming. Such report shall also include changes to such protocols, procedures, materials, and nomenclature SSA has considered using to help beneficiaries make more informed decisions regarding the timing of their retirement claim and improve the public's understanding of the effect of different claiming strategies.	We acknowledge the Committee's statement. We are committed to providing clear, accurate, and accessible information about Social Security in plain language to help individuals make well-informed decisions regarding their retirement planning. Many of the terms we use to inform the public, including "retirement age" and "early retirement age," are defined in Section 202 and Section 216 of the Social Security Act. Benefit information is readily available to the public on our website[7], blog, external publications, benefit estimators, and via their Social Security Statement and *my* Social Security account. In October 2021, we released a redesigned Social Security Statement[8] that provides a bar graph showing the impact of claiming age on monthly benefit amounts. We also provide

[7] Please see the example on our website at: https://www.ssa.gov/retirement/plan-for-retirement
[8] Please see the example on our website at: https://www.ssa.gov/myaccount/assets/materials/statement-redesign-online.pdf

Senate Committee Report Item	Action taken or To Be Taken
	supplemental fact sheets[9] that accompany the Statement which explain more about how a person's benefit start date affects how much they will receive. These documents were created to provide retirement-aged individuals with a better understanding of how their claiming decision impacts their potential benefit amount.
Communications to my Social Security Account Holders The Committee directs SSA to ensure that its communications with the public, particularly direct emails to my Social Security Account holders, be nonpartisan and factual.	We acknowledge the Committee's statement.
Cooperative Disability Investigations (CDI) The Committee directs SSA to provide an update in its FY 2027 Congressional Justification on CDI units, including updates on the program's projected savings to SSA's disability programs, total recovery amounts, and projected savings to other Federal and State programs. Such updates shall also include suggestions regarding other ways Federal and State agencies may partner on anti-fraud initiatives with respect to Social Security programs.	Please refer to the Improper Payments and Anti-fraud exhibit in the LAE section and the Inspector General section of this Congressional Justification that satisfies this requirement.
Data Sharing and Systems Integration The Committee recognizes the importance of improving access to accurate and timely information to support eligibility determinations and program integrity across Federal and State-administered programs. The Committee encourages the SSA, in coordination with the Department of Labor (DOL), to conduct a legal review of the authority, requirements, and limitations governing the sharing of relevant SSA and DOL held data with State agencies and third-party entities. The Committee further encourages SSA to evaluate opportunities for	We acknowledge the Committee's statement.

[9] For an example, please visit: https://www.ssa.gov/myaccount/assets/materials/workers-61-69.pdf

Senate Committee Report Item	Action taken or To Be Taken
secure system integration or automated data exchange solutions while protecting individual privacy and ensuring compliance with applicable law.	
Digital Identify Authentication The Committee recognizes potential efforts to adopt digital identity authentication technologies to accompany Federal benefit verification practices. The Committee requests a briefing within 90 days of enactment on SSAs efforts in this area, including how it is addressing the digital literacy and accessibility needs of the populations it serves and how it is mitigating potential risks and ensuring data privacy.	We will reach out to the Committee to schedule the briefing.
Service Delivery The Committee notes there are significant service delivery challenges at SSA that are impacting critical services that millions of Americans count on. The Committee directs SSA to provide monthly briefings to the Committees on Appropriations of the House of Representatives and the Senate on the steps it is taking to address these issues, including but not limited to, decreasing disability claim processing times, ensuring prompt processing of retirement claims, addressing delays on SSA's 1–800 number and in field offices, and general improvement to customer experience when contacting SSA. The Committee directs SSA to provide the Committees a monthly report of performance metrics that measure SSA's progress on addressing key service delivery challenges. In addition, the Committee directs GAO to conduct a review of service delivery challenges at SSA and SSA's steps to address them. Finally, the Committee directs SSA to ensure that changes to internal policies, including changes to its Program Operations Manual System are deliberate and include public and stakeholder input when appropriate. The Committee directs SSA to notify the Committees in advance of any changes to its internal policies that could	We acknowledge the Committee's request for monthly briefings and will continue to provide monthly performance reports to the Committees. Monthly performance updates are also available on https://www.ssa.gov/ssa-performance.

Senate Committee Report Item	Action taken or To Be Taken
reasonably be expected to meaningfully impact the public's interactions with SSA.	
Rural and Frontier Service Delivery The Committee is concerned that senior citizens and Americans with disabilities in rural and frontier areas of the nation are unable to access in-person Social Security services and that access by phone or videoconference is limited. The Committee strongly urges SSA to evaluate its service delivery options in rural and frontier areas and, when feasible, implement expanded access to options that have been most effective for residents of these areas to ensure that SSA is able to provide timely assistance, whether in-person, by phone, or by video conference.	We acknowledge the Committee's statement and are committed to providing timely assistance to individuals in rural and frontier service areas.
Survivor Benefits Processing The Committee notes the importance of ensuring that timely, quality beneficiary services are rendered to current and prospective recipients of survivors benefits. The Committee emphasizes that, as with other types of Social Security benefits, the timing of claiming and associated services can be critical for the livelihood of survivors, especially child beneficiaries.	We acknowledge the Committee's statement.
Ticket to Work Improvements The Committee recognizes that the Ticket to Work program may be underutilized and can provide important resources for individuals looking to return to work. The Committee encourages SSA to work to identify ways to improve the program's effectiveness through existing and relevant statutory authorities.	We acknowledge the Committee's request.
Vocational Guidelines The Committee is aware that implementation of the Occupational Information System (OIS) project, which aims to bring the vocational list used in disability determinations in line with current job opportunities, is ongoing. The Committee notes that SSA has obligated and expended significant resources and time on this project to date. Therefore, the Committee	Please refer to the Research and Demonstration exhibit in the Supplemental Security Income (SSI) Program section of this FY 2027 Congressional Justification.

Senate Committee Report Item	Action taken or To Be Taken
directs SSA, within 90 days of enactment of this act, to provide a briefing to the Committees on Appropriations and Finance of the Senate and the Committees on Appropriations and Ways and Means of the House of Representatives regarding SSA's status in making these changes to occupational data, completed actions to date, and planned actions for this project over the coming fiscal year.	
Agency Performance Reports The Committee looks forward to receiving the FY 2025 Agency Performance Reports from the Departments and agencies funded in this act. Not later than 45 days after enactment of this act, the Committee directs the Departments funded in this act and Corporation for National and Community Service (CNCS) to provide a briefing on their strategic plan goals for FY 2025 and FY 2026 and the actions the Departments and CNCS have taken or plan to take to meet those goals, including through any planned workforce, programmatic (including planned programmatic reviews), and organizational changes and how the Departments and CNCS deter-mined those changes would improve direct services and grantee oversight and support.	We will share the FY 2025 Agency Performance Report and will reach out to the Committee to schedule the briefing on strategic plan goals when they are published.
Consultation and Briefing Requirement The Committee directs the Departments funded in this act and Corporation for National and Community Service (CNCS) to consult with the Committee on any actions expected to significantly increase or decrease current or future costs of programs they administer. In addition, the Committee directs the Departments funded in this act and CNCS to consult with the Committee on any execution action related to any program or activity for which a directive is included in this report not later than 4 weeks prior to a public announcement related to such action. Further, the Committee directs the Departments funded	We acknowledge the Committee's statement.

Senate Committee Report Item	Action taken or To Be Taken
in this act and CNCS to brief the Committee on any action covered by this consultation requirement, including consideration and incorporation of feedback during such initial consultation, not later than 1 week prior to a public announcement related to such action. This paragraph does not replace a more specific directive for a program or activity included in this report.	
Lifesaving Safety Stations The Committee is encouraged by the General Services Administration's Bulletin FMR C–2024–01, ''Safety Station Program Guidelines in Federal Facilities'' that was issued on December 21, 2023. The Committee encourages all Departments covered in this act to implement these guidelines and establish safety stations in each public building that include automated external defibrillators, opioid reversal agents, and hemorrhagic control programs and requests a briefing from each Department within 90 days of enactment of this act on progress towards implementing these guidelines.	We acknowledge the Committee's statement and will reach out to the Committee to schedule the briefing.

Table 3.5—Joint explanatory statement accompanying P.L. 119-75, *The Consolidated Appropriations Act, 2026*

Conference Report Item	Action Taken or To Be Taken
Codebase Modernization The agreement directs the SSA, within 180 days of enactment of this Act, to submit to the Committees a report on SSA's use of COBOL and progress on the secure migration of the code base to a modern programming language where applicable.	We acknowledge the Committee's interest in codebase modernization. SSA's Chief Information Officer briefed Committee staff on July 8, 2025, and addressed the use of COBOL language. COBOL delivers solutions that have been battle-tested for decades, reliably processing more than a trillion dollars in payments annually with unmatched stability and uptime. COBOL excels at fixed-point arithmetic, critical for accurate handling of monetary values without rounding errors-something languages like Java can struggle with unless carefully managed. Additionally, risk of a

Conference Report Item	Action Taken or To Be Taken
	large "porting" effort to another language would introduce enormous destabilization risks and would require running new and old systems in parallel to validate success for a long period of time (think about annual cyclical events). We continue to inject modern systems (e.g., cloud-native apps, Application Programming Interfaces) for new features and use COBOL where it is best suited while modernizing underlying database and infrastructure to minimize operational and development cost.
Information Technology (IT) Activities The agreement directs SSA to provide a report to the Committees, within 90 days of enactment of this Act, detailing the number, amount, and general content of contracts, grants, and cooperative agreements awarded under SSA's IT portfolio. Such a report shall be grouped by heading and subheading on Table 3.24 of the FY 2026 congressional justification.	We will provide the report by the requested due date. The report shall be grouped by heading and subheading on Table 3.24 of the FY 2026 Congressional Justification.
Staffing Plan The agreement includes an increase of $50,000,000 for SSA's base administrative expenses for resources to help ensure SSA has the necessary workforce to operate efficiently and provide high-quality service to program beneficiaries. The agreement is concerned by any reductions in direct-service operations, including staff at field offices and processing and teleservice centers, and provides resources for SSA to increase the number of staff on the frontlines. The agreement directs SSA to take steps to avoid field office closures, reduced office hours, and increased delays to appointments for beneficiaries seeking in-person support. As part of the monthly staffing report requested in Senate Report 119-55, the agreement directs SSA to include appointment waiting times by field office.	We acknowledge the Committee's request and will provide monthly reports.

Conference Report Item	Action Taken or To Be Taken
Work Incentives Planning and Assistance (WIPA) and Protection and Advocacy for Beneficiaries of Social Security (PABSS) The agreement includes $23,000,000 for WIPA grants and $10,000,000 for PABSS.	We acknowledge the Committee's statement.
Budget Submission As part of the President's Budget Request, each Department is directed to provide the Committees in an electronic format, a table that corresponds with every program line found in the detailed table at the end of this explanatory statement. Such a table shall include a column for the most recently enacted appropriation, the current year, and the budget year, assuming current law.	This Congressional Justification is available on our https://www.ssa.gov/budget website. Please refer to the All Purpose Table, the Budget Authority and Outlays, and the Amounts Available for Obligation exhibits in the LAE section of this Congressional Justification that satisfies this requirement.
Congressional Reports Each Department or agency is directed to provide the Committees, within 30 days from the date of enactment of this Act and quarterly thereafter, a summary describing each requested report to the Committees along with related actions completed in the current and prior quarters and planned actions to be completed in future quarters. Such a summary shall be cumulative for all fiscal years for which any report remains outstanding.	We will provide the reports by the requested due dates.
Questions for the Record The agreement notes the inclusion of section 526 of this Act, which requires each Department and agency to provide answers to questions submitted for the record within 45 business days after receipt. The agreement expects each Department and agency to notify the Committees at least 7 days in advance if they do not anticipate meeting this statutory requirement.	We acknowledge the Committee's statement and will provide responses by the requested due dates or notify the Committees at least 7 days in advance.
Operating Plan In addition to the operating plan requirement in section 516 of this Act, the agreement notes that section 416 of the Military Construction, Veterans Affairs, and Related Agencies Appropriations Act, 2026 requires each Department or agency funded in this Act in	We submitted our Operating Plan to the Committees on March 19, 2026, and plan to submit monthly thereafter.

Limitation on Administrative Expenses

Conference Report Item	Action Taken or To Be Taken
FY 2026 to provide a monthly report on funds that are allotted and available for obligation and on obligations as of the end of the month, by program, project, and activity.	

IMPROPER PAYMENTS AND ANTI-FRAUD

We are deeply committed to preserving and protecting Social Security and ensuring that all eligible individuals receive the benefits they are entitled. We have consistently maintained high payment accuracy for Old-Age, Survivors, and Disability Insurance (OASDI). Our internal quality reviews, validated by a third-party auditor, indicate that our fiscal year (FY) 2024 OASDI benefit payments were 99.79 percent free of overpayments and 99.93 percent free of underpayments.[10] For the same year, 89.97 percent of all Supplemental Security Income (SSI) payments were free of overpayments, and 98.45 percent were free of underpayments.[11] FY 2025 data are not yet available. Given the magnitude of annual benefit payments, even small error rates result in substantial improper payment amounts. For instance, in FY 2024, we issued about $1.5 trillion in benefit payments, with projected improper payments totaling $4 billion for OASDI and $7.3 billion for SSI.

We have taken decisive action to improve SSI accuracy. For the first time in the history of the program, we have named an executive lead to improve the SSI program. In FY 2025, we implemented changes targeted to address the leading causes of SSI payment error: undisclosed wages and assets. For all SSI Aged initial claims, we now query the Access to Financial Institutions (AFI) data at the time of claim intake with a zero-dollar tolerance, which identifies before the claim is adjudicated undisclosed assets, which may make a claimant ineligible. We intend to expand this same practice to all initial SSI Blind and Disabled claims. To timely identify wages that may impact the eligibility or payment amount of SSI recipients, at the beginning of each month, we now run a verification through our Payroll Information Exchange (PIE) (as authorized in statute), so we can correct benefit payments earlier in the process and prevent payment error. Addressing payment accuracy is a top priority, and we are actively implementing process improvement and technology measures to improve the SSI payment accuracy.

We are committed to being good stewards of taxpayer resources and improving the integrity of our programs. In September 2025, the Commissioner established a new SSI Improvement office to ensure comprehensive and dedicated oversight of the SSI program and to advance key administrative reforms in policies, processes, and automation. Since its inception, we have revised and clarified a number of SSI policies, prioritized work that will drive down improper payments, and improved the program's digital footprint through the expansion of AFI and Foreign Travel Data (FTD). Our efforts to reduce improper payments include actions such as leveraging data from exchanges with Federal, State, and private partners; automating our business processes; performing quality reviews; and conducting employee training and focused outreach. To improve understanding and reduce the burden on our customers and their employers, we updated several disability-related forms, including the Work Activity form (SSA-821) and Self-Employment Activity form (SSA-820) to simplify, consolidate, and clarify questions. We also formed a workgroup to redesign the Employee Work Activity Questionnaire (SSA-3033) to simplify and reduce the burden on employers and service providers, providing examples of subsidy and guidance on calculating subsidy amounts.

[10] We derive accuracy rates for OASDI based on a monthly sample of beneficiaries who reside in the U.S. and outside of the 50 States or U.S. territories.

[11] We derive accuracy rates for SSI using data collected from the review of a national sample of SSI cases.

Limitation on Administrative Expenses

We safeguard our programs by efficiently and effectively preventing, detecting, deterring, and mitigating fraud and improper payments. We administer our anti-fraud program and improper payment initiatives and support the Office of the Inspector General's (OIG) efforts to investigate fraud, develop consistent anti-fraud policies and processes, formulate anti-fraud initiatives, and align anti-fraud efforts with industry standards.

For additional information about our payment accuracy, root causes of improper payments, and ongoing efforts to improve payment accuracy, please refer to the Program Integrity exhibit, our Annual Performance Report, Agency Financial Report, and PaymentAccuracy.gov.

IMPROPER PAYMENT REDUCTION EFFORTS

Electronic Wage Reporting

Wages are a leading cause of improper payments in the Disability Insurance (DI) and SSI programs, as both rely on beneficiaries and recipients to report changes in wage and employment information. Despite reporting requirements, beneficiaries and recipients do not always report or report timely, leading to improper payments.[12] To address these errors, we implemented PIE, an automated method of collecting wage and employment information from payroll data providers (PDP). For those who provide authorization and have a participating employer, PIE reduces the burden of reporting wage information and lessens the time our technicians spend obtaining and verifying wage data.

After publishing the final rule for PIE, the agency decided to implement PIE in phases with the initial exchange occurring on April 7, 2025. We gradually increased the volume of Social Security numbers (SSN) exchanged each month until reaching full implementation of approximately 10.7 million SSNs in September 2025. We continue monthly exchanges for all authorized individuals whose employers report to the PDP. As part of the implementation activities, we provided training to technicians, updated our policies and instructions, and released communication to the public.

PIE is operational for both the DI and SSI programs, and, since full implementation, we have exchanged between 10.7 and 10.9 million authorizations per month—averaging approximately 800,000 to 900,000 returned SSNs with wages. The program's estimated savings are approximately $2 billion for FY 2025–2034.

In FY 2026 and beyond, we will implement enhancements in support of PIE and are undertaking activities to increase participation. We plan to implement more robust management information, develop a process for handling SSNs flagged for name mismatch, and develop requirements to display the wage and employment data to beneficiaries among other planned enhancements.

[12] For DI, improper payments are generally due to work at Substantial Gainful Activity levels; for SSI, improper payments are largely due to wages contributing to countable income and related payment errors.

PIE will help improve payment accuracy, reduce improper payments, and reduce the reporting burden on individuals when they authorize us to obtain this information through an information exchange, and we receive it. We also anticipate that PIE will result in more efficient use of our administrative resources because our technicians would reduce the amount of time they spend (a) manually requesting and verifying this information from payroll data providers and employers, (b) manually entering data into our systems from an individual's pay records, (c) contacting individuals to request this information, and (d) assisting individuals with the results of incomplete or untimely reporting.

For individuals or employers not participating in PIE, we continue to offer electronic wage reporting tools, such as the myWageReport (myWR) online tool. myWR allows DI beneficiaries, SSI recipients, concurrent beneficiaries, and representative payees to report wages and view, print, or save a receipt. Self-reporters and their representative payees can report wages that occurred within a two-year timeframe from the reporting date. From April–May 2025, we released social media posts on Facebook and X sharing a link to our YouTube video to help beneficiaries learn why it is important to report wages and the automated electronic options for wage reporting. This included instructional videos with step-by-step instructions on how to use the agency's self-reporting wage applications.

In FY 2026, we will use our social media channels to post reminders for our beneficiaries about the importance of promptly reporting changes that impact their eligibility and payment amounts. These posts will inform beneficiaries how we are required by law to adjust payments or recover debts when people receive payments they are not entitled to.

Access to Financial Institutions Expansion Initiative

SSI stewardship reports indicate that improper payments are often driven by underreported or undisclosed financial accounts. We are taking a proactive approach to address this root cause. To ensure better accuracy, we are intercepting improper payments at the point of entry, reducing costly post-payment recoveries, and ensuring that only eligible individuals receive benefits.

Our AFI program addresses improper payments by requiring technicians to verify applicants', recipients', and deemors' allegations of liquid resources of $400 or more during initial claims and post-eligibility events to ensure compliance with SSI resource limits.

Effective August 1, 2025, we expanded AFI verifications to require financial institution verification for all SSI aged (65+) initial claim allowances, regardless of alleged resources. These AFI verifications occur prior to adjudication and payment. This $0 threshold policy marks a strategic shift from relying on self-reported information to a "verify before we pay" standard. By requiring verification of bank account ownership and balances before any payment is issued, we are closing longstanding gaps that allowed improper payments due to undisclosed or underreported financial assets. With this change we expect to identify an additional $262 million in improper payments. As we monitor the impact of this initiative, we are preparing to further expand AFI requirements to all SSI initial claims, reinforcing our commitment to program integrity and payment accuracy.

Foreign Travel Data

FTD is an agency application that provides direct access to the Department of Homeland Security's (DHS) Arrival and Departure Information System. By maximizing the use of FTD, we can more effectively identify unreported absences from the U.S. that affect SSI eligibility, thereby increasing the detection of improper payments. Effective January 2026, we expanded the use of FTD to include U.S. citizens during redeterminations and initial claims—prior to the issuance of SSI payments, in certain situations. The expansion also applies to non-citizens during initial claims, prior to payment, in all cases. In addition, we are engaging with DHS's Customs and Border Protection to assess the feasibility of establishing an automated data exchange for FTD. We expect to finish the data exchange project in early FY 2027.

Social Security Fairness Act

On January 5, 2025, the *Social Security Fairness Act of 2023* was signed into law, thereby repealing the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO). December 2023 is the last month that WEP and GPO will apply. This means that those rules no longer apply to benefits payable for January 2024 and later. The agency worked quickly and successfully to implement these changes. As of July 7, 2025, we completed sending over 3.1 million payments, totaling $17 billion, to beneficiaries eligible under the *Social Security Fairness Act*. The average retroactive payment was $7,208. We began releasing higher monthly benefit payments in April 2025. As of September 30, 2025, we have taken over 387,000 new initial claims. We anticipate the WEP and GPO repeal will significantly reduce and eventually eliminate WEP and GPO improper payments in future years.

Treasury Offset Program

In March 2025, we resumed use of the Treasury Offset Program (TOP) after suspending it in March 2020 because of the effects of the COVID-19 pandemic. From March–September 2025, we collected approximately $60 million from those who were notified of TOP debt referral prior to program suspension. We resumed sending pre-offset notices for all delinquent debts incurred after March 2020, beginning in August 2025. We have also begun to explore use of the Department of the Treasury's (Treasury) Centralized Receivables Service, a shared service provider that performs collection work for agencies.

In compliance with Executive Order 14249, *Protecting America's Bank Account Against Fraud, Waste, and Abuse*, we are actively working with Treasury's Do Not Pay (DNP) to assess SSA's onboarding and compliance for all benefit and administrative payments.

Currently, we use DNP on a small scale to perform single searches to identify death records for beneficiaries. Death records that we obtain from DNP data sources serve as leads for administrative actions or, if indicators of potential fraud are present, referrals to OIG for investigation. As of September 30, 2025, we have retrieved death records from DNP for 222 beneficiaries with an estimated $10.5 million in combined losses in improper payments. As a result, we have posted $4.0 million in overpayments—funds that the agency is attempting to recoup—to these beneficiaries' records.

Online Remittance Processing

Our Online Remittance Processing provides individuals multiple options for repaying debts. As of the fourth quarter of FY 2025 (September 30, 2025), we processed over 464,000 remittances and collected over $102 million through our Pay.gov remittance option. Our Online Bill Pay option processed over 48,000 remittances and collected over $5.2 million. Combined with our previously implemented Social Security Electronic Remittance System, these remittance options now process 64 percent of our remittances.

ANTI-FRAUD INITIATIVES

National Anti-Fraud Committee

The National Anti-Fraud Committee (NAFC) provides a forum for senior leadership to collaborate and provide strategic guidance on fraud challenges and mitigation opportunities. In March 2025, we updated the NAFC Charter to reflect current roles, responsibilities, objectives, and initiatives. In FY 2025, we convened regular meetings and the annual Anti-Fraud Summit, as mandated by the Charter, and plan to continue these efforts in FY 2026.

Enterprise Fraud Risk Management Program

Our Enterprise Fraud Risk Management (EFRM) program is dedicated to proactively identifying, assessing, and mitigating fraud risks across our organization's major lines of business and services. In alignment with the *Government Accountability Office Fraud Risk Framework*, *Payment Integrity Information Act of 2019*, and OMB Circular No. A-123. We conduct comprehensive fraud risk assessments and develop detailed fraud risk profiles for each of our key operational areas.

Since the introduction of our fraud risk position products in FY 2022, the EFRM program has made significant progress in strengthening our agency's fraud risk posture. To date, we have completed 7 fraud risk reviews and 17 fraud risk determinations through FY 2024.

In FY 2025, we conducted re-assessments of fraud risks within the eServices platform, as well as within the representative payee. Additionally, we finalized the fraud risk profile for our administrative programs, further enhancing our understanding of potential vulnerabilities and areas for improvement

In FY 2026, we will complete the re-assessment of Fraud Risk Profile of the Disability programs. Additionally, we will finalize the fraud risk profiles for the eServices and Representative Payee programs.

Looking ahead, our plans for FY 2027 include completing a re-assessment of fraud risks in the SSI program. We also intend to complete the fraud risk profile for the disability program, ensuring that our risk management strategies remain current and effective in addressing emerging threats.

Limitation on Administrative Expenses

Our suite of fraud risk position products serve as a foundation for fraud mitigation planning and strategy development. By leveraging the results of both scheduled and unscheduled risk assessments, we are committed to continuously improving our ability to detect, prevent, and respond to fraud across all agency programs and services.

We are actively working to enhance our processes to ensure that fraud risks are strategically assessed and that resources are allocated to address the most significant and pressing risks facing the agency.

Enhanced Identity Proofing and Fraud Controls

Identity proofing is essential for preventing identity fraud while providing quality customer service. Effective identity proofing reduces the risk of fraud, safeguards sensitive information, and builds trust in our services. As fraudulent actors become increasingly capable, we have employed risk-based approaches to mitigate identity fraud.

To address identity theft, we have strengthened identity-proofing and fraud controls across all service channels, focusing on transactions most exposed to identity fraud. Individuals wishing to make direct deposit changes or conduct certain types of transactions via the telephone must now provide a Security Authentication PIN or visit a field office in person. This practice aligns identity proofing standards for direct deposit changes across all service channels and reduces reliance on traditional knowledge-based verification questions, which often rely on information readily available to identity thieves.

In March 2025, we implemented a series of real-time bank verification checks that includes Treasury's Bureau of the Fiscal Service 's Account Verification Service. This process provides instant bank verification to proactively and timely prevent fraud associated with direct deposit change requests.

In May 2025, we began requiring users to prove their identity with ID.me or Login.gov to access our online services. This federated approach aligns with whole-of-government requirements for access to online services. We continue to adopt online identity proofing to meet emerging requirements and use modern, risk-based technologies and methods to increase usage of our digital services while defending those services from fraudulent actors.

Also, in compliance with Executive Order 14247, *Modernizing Payments To And From America's Bank Account*, we reviewed and updated policies concerning the issuance of paper checks. We are taking steps to further reduce the number of benefits disbursed by paper check to minimize costs, delays, lost payments, theft, and risks of fraud. In July and August 2025, we sent mailers to all beneficiaries and recipients who receive a paper check, advising them to convert their payment method. Waivers are available in limited circumstances. We will continue to work with Treasury to further refine our processes and outreach as needed.

Employee Training

Our employees are on the front lines defending against fraud. We remain dedicated to equipping employees with the tools they need to effectively prevent, deter, detect, and mitigate fraud. We

regularly supplement initial new hire training with detailed policy instructions, reminders, and instructional videos. In FY 2025, our employees participated in annual, mandatory anti-fraud training, including content on mitigating fraud risk in agency programs, inspecting and verifying documents when identity proofing individuals, applying residency requirements in the SSI program, and submitting fraud allegations to OIG. In FY 2026, we plan to release another mandatory anti-fraud training in June 2026.

Cooperative Disability Investigations

Cooperative disability investigation (CDI) units are highly successful at detecting fraud before a disability decision is made, during appeals, and as part of continuing disability reviews. CDI units have contributed to projected savings to taxpayers of more than $8.2 billion since their inception. During FY 2025, CDI units led to 1,444 disability claims being denied or ceased due to participant ineligibility, $98.9 million in projected savings for SSA programs, and $24.2 million in SSA monetary accomplishments through recoveries, fines, judgments, restitutions, and settlements. CDI efforts also led to $111.6 million in projected savings for non-SSA programs. The CDI program is a collaborative effort among SSA, OIG, State disability determination services, and local law enforcement to identify, investigate, and prevent disability-related fraud. We currently have 50 CDI units covering all 50 States and U.S. territories. In FY 2026, we are prioritizing hiring to increase staffing in our CDI units.

Fraud Prevention Units

We have a fraud prevention unit (FPU) based in New York City, which supports the agency's anti-fraud programs, including processing fraud redeterminations under sections 205(u) and 1631(e)(7) of the *Social Security Act*. The unit is comprised of disability processing specialists, management officials, and administrative support. The unit enhances our capacity to provide expert analytical and programmatic support to disability fraud investigations. As new fraud schemes emerge, policy evolves, and legal disputes arise, we continuously adapt our support so the FPU can effectively carry out the redetermination process. FPU actions help mitigate fraud losses for the agency and our customers.

Special Review Cadre

Created in 2017, the special review cadre (SRC) is a team of specialized administrative law judges, attorneys, and legal specialists with significant expertise in adjudicating non-disability and fraud and similar fault cases, including processing fraud redeterminations under sections 205(u) and 1631(e)(7) of the *Social Security Act* at the hearings level. Adjudicating fraud or similar fault is a highly complex inquiry, often involving the OIG testimony, cross-examination of witnesses, and hundreds of pages of criminal investigatory material. SRC adjudicators are trained and experienced in managing these hearings, evaluating allegations of fraud, and identifying patterns of fraudulent activity. This specialized adjudication is critical to the agency's anti-fraud efforts.

Special Assistant United States Attorneys

Law and Policy maintains a robust criminal fraud program, recruiting, hiring, and assigning criminal fraud prosecutors as Special Assistant United States Attorneys (SAUSA) to multiple United States Attorney's Offices nationwide. These SAUSAs work with OIG and other Federal and State law enforcement agencies to investigate and prosecute cases of alleged Social Security fraud and related crimes that would not otherwise be prosecuted in Federal courts. We are expanding SAUSAs to 50 U.S. Attorney's Offices consistent with the April 15, 2025 Presidential Memorandum, Preventing Illegal Aliens from Obtaining Social Security Act Benefits. Pursuant to the Presidential Memorandum, the program implemented a major hiring initiative in FY 2025, resulting in the recruitment and selection of over 25 SAUSAs. The onboarding of the SAUSAs will take place in FY 2026.

CONSULTATIVE EXAMS

In some cases, a claimant does not provide adequate evidence about their impairment(s) for the State Disability Determination Services (DDS) to determine whether they are disabled or blind. When sufficient evidence cannot be obtained from the claimant's medical sources(s), the DDS may request to purchase a physical or mental examination or test from a qualified medical provider as evidence to support the claim. These examinations are referred to as consultative examinations (CEs).

Historically, SSA requests at least one CE for around 35 percent of all cases processed and reimburses the States almost $400 million a year for CE purchases. In FY 2025, the national CE rate was 35.1 percent and CE costs totaled $386.08 million. The States use the Medicare fee schedule as a baseline to establish their CE reimbursement rates, which helps ensure consistency, cost effectiveness, and reasonable pricing. DDS agencies are not permitted to set fees for CEs above the Medicare benchmark.

We have made it a priority to maintain good working relationships within the medical community to recruit and sustain a sufficient pool of physicians and specialists who are qualified and willing to conduct CEs. At the same time, we are reviewing the processes for ordering a CE in each state to ensure nationwide consistency. By sharing best practices across the DDSs to order a CE only when it is absolutely necessary, we will reduce the burden on claimants and medical providers—and optimize agency resources.

Table 3.6—FY 2025 Consultative Examination Counts and Cost Data[13]

FY 2025 CEs (All Workloads)	Annual Number of Cases Completed with at Least One CE[14]	CE Rate[15]	CE Costs[16]	CE Cost per Case[17]
National Total (DDS + Federal)	**1,263,672**	**35.10%**	**$386,213,897**	**$305.63**
ALL DDS	1,263,365	35.10%	$386,088,679	$305.60
Federal	307	5.60%	$125,218	$407.88
AK	848	24.70%	$745,784	$879.46
AL	31,724	42.10%	$9,799,544	$308.90

[13] Extended Service Team (EST) CE data and costs are included in the State amounts (VA, AR, OK). Number of cases include initial disability claims, disability reconsiderations, continuing disability reviews, and disability hearings completed with at least one CE.
[14] Our systems track the number of cases with at least one paid CE, not the total number of CEs ordered and completed for any given case.
[15] CE rate is the number of completed cases for which at least one CE is ordered and paid compared to the total number of completed cases. This rate does not reflect the total volume of CEs ordered and paid. Our systems do not include the level of detail to identify if CEs were conducted by the treating medical provider.
[16] CE costs represent costs for all CEs, including if there were more than one CE per case.
[17] CE cost per case represents total CE costs divided by the number of cases with at least one CE.

Limitation on Administrative Expenses

FY 2025 CEs (All Workloads)	Annual Number of Cases Completed with at Least One CE[14]	CE Rate[15]	CE Costs[16]	CE Cost per Case[17]
AR	17,613	28.00%	$6,404,176	$363.61
AZ	22,764	34.80%	$10,758,326	$472.60
CA	135,694	44.60%	$38,639,487	$284.75
CO	13,133	33.50%	$5,859,368	$446.16
CT	10,332	31.70%	$2,336,725	$226.16
DC	2,838	32.80%	$1,354,274	$477.19
DE	3,531	28.20%	$1,601,142	$453.45
FL	100,817	38.60%	$29,919,248	$296.77
GA	43,520	37.00%	$15,583,510	$358.08
HI	2,581	25.30%	$974,999	$377.76
IA	9,221	28.60%	$3,356,665	$364.02
ID	4,999	26.60%	$1,848,175	$369.71
IL	52,694	39.20%	$13,624,901	$258.57
IN	32,157	38.70%	$7,521,590	$233.90
KS	8,492	36.60%	$4,069,005	$479.16
KY	30,199	37.40%	$8,546,740	$283.01
LA	23,833	33.80%	$6,526,701	$273.85
MA	16,229	21.60%	$4,911,811	$302.66
MD	23,534	44.50%	$10,604,471	$450.60
ME	4,796	33.50%	$1,201,633	$250.55
MI	42,977	36.10%	$11,517,711	$268.00
MN	11,530	26.10%	$4,822,559	$418.26
MO	25,153	35.70%	$6,702,361	$266.46
MS	24,033	37.90%	$6,356,857	$264.51
MT	3,236	31.60%	$1,836,366	$567.48
NC	43,989	35.10%	$11,951,793	$271.70
ND	1,305	21.50%	$628,476	$481.59
NE	5,113	32.40%	$2,280,893	$446.10
NH	4,305	38.00%	$1,433,901	$333.08
NJ	27,540	30.80%	$8,538,545	$310.04
NM	6,382	33.40%	$1,965,668	$308.00
NV	9,048	29.50%	$2,687,371	$297.01
NY	98,362	45.60%	$22,939,107	$233.21
OH	49,428	32.60%	$13,259,843	$268.27
OK	20,970	38.80%	$5,591,498	$266.64
OR	10,282	25.80%	$3,737,490	$363.50
PA	57,091	36.50%	$15,181,182	$265.91
PR	9,815	54.80%	$2,511,610	$255.90
RI	3,490	28.30%	$803,906	$230.35
SC	17,836	25.10%	$5,225,770	$292.99
SD	1,990	22.00%	$1,354,811	$680.81
TN	36,848	41.80%	$12,093,338	$328.20
TX	85,658	32.50%	$28,689,423	$334.93
UT	6,272	29.00%	$3,114,388	$496.55

FY 2025 CEs (All Workloads)	Annual Number of Cases Completed with at Least One CE[14]	CE Rate[15]	CE Costs[16]	CE Cost per Case[17]
VA	15,909	17.60%	$4,420,702	$277.87
VT	2,365	36.50%	$675,586	$285.66
WA	21,026	32.90%	$9,306,545	$442.62
WI	15,293	32.80%	$5,162,741	$337.59
WV	12,794	44.60%	$3,800,591	$297.06
WY	1,469	28.90%	$1,184,153	$806.09

APPROPRIATION HISTORY

The table below includes the amount requested by the President, passed by the House and Senate Committees on Appropriations, and ultimately appropriated for the LAE account, including any rescissions and supplemental appropriations, for the last 10 years. The annual appropriation includes amounts authorized from SSI State Supplement user fees and non-attorney representative user fees.

Table 3.7—Appropriation History Table

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
2017	$13,067,000,000 [1]	$11,898,945,000 [2]	$12,481,945,000 [3]	**$12,481,945,000** [4]
2018	$12,457,000,000 [5]	$12,392,945,000 [6]	$11,992,945,000 [7]	**$12,872,945,000** [8]
2019	$12,393,000,000 [9]	$12,557,045,000 [10]	$12,951,945,000 [11]	**$12,876,945,000** [12]
2020	$12,773,000,000 [13]	$13,071,945,000 [14]	- - - [15]	$12,870,945,000 [16]
CARES Act [17]				$338,000,000
Final				**$13,208,945,000**
2021	$13,351,473,000 [18]	$12,970,945,000 [19]	- - - [20]	$12,930,945,000 [21]
Supplemental [22]				$38,000,000
Final				**$12,968,945,000**
2022	$14,188,896,000 [23]	$14,066,945,000 [24]	- - - [25]	**$13,341,945,000** [26]
2023	$14,773,300,000 [27]	$14,441,945,000 [28]	- - - [29]	**$14,126,978,000** [30]
2024	$15,489,200,000 [31]	$13,953,978,000 [32]	$14,418,978,000 [33]	**$14,226,978,000** [34]
2025	$15,401,924,000 [35]	$13,825,776,000 [36]	$14,735,978,000 [37]	**$14,298,978,000** [38]
2026	$14,792,978,000 [39]	$14,792,978,000 [40]	$14,892,978,000 [41]	**$14,842,978,000** [42]
2027	$14,868,978,000 [43]			

[1] The FY 2017 Budget included $1,819,000,000 in dedicated program integrity funding for, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, cooperative disability investigation (CDI) units, and the prosecution of fraud by Special Assistant United States Attorneys (SAUSAs), comprised of $273,000,000 in base funding and $1,546,000,000 in funds outside the discretionary caps as authorized by the Bipartisan Budget Act (BBA) of 2015 (P.L. 114-74). Additionally, the LAE account carved out funding to support the fully loaded costs of performing 1.1 million CDRs and approximately 2.8 million SSI redeterminations, $126,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (SSPA) (P.L. 108-203).

[2] H.R. 5926.

[3] S. 3040.

[4] Consolidated Appropriations Act, 2017 (P.L. 115-31). Total included $90,000,000 in available funding through September 30, 2018, for activities to address the hearings backlog within the Office of Hearings Operations (formerly the Office of Disability Adjudication and Review). Included $1,819,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,546,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74) to remain available until

March 31, 2018. Included $123,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

[5] The FY 2018 Budget included $1,735,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,462,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74). Included up to $118,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

[6] H.R.3358.

[7] S. 1771.

[8] Consolidated Appropriations Act, 2018 (P.L. 115-141). Total included $280,000,000 to remain available until expended for information technology modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with information technology modernization. Total included $100,000,000 in available funding through September 30, 2019, for activities to address the hearings backlog within the Office of Hearings Operations. Included $1,735,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,462,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74) to remain available for 18 months through March 31, 2019. Included $118,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

[9] The FY 2019 Budget included $1,683,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,410,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74) to remain available until March 31, 2020. Beginning in FY 2019, the Budget proposed that we may transfer up to $10,000,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. Included up to $134,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

[10] H.R. 6470.

[11] S. 3158.

[12] Department of Defense and Labor, Health and Human Services, and Education Appropriations Act, 2019 and Continuing Appropriations Act, 2019 (P.L. 115-245). Total included $45,000,000 to remain available until expended for information technology modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with information technology modernization. Total included $100,000,000 in available funding through September 30, 2020, for activities to address the hearings backlog within the Office of Hearings Operations. Included $1,683,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,410,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74) to remain available for 18 months through March 31, 2020. Public Law 115-245 allowed us to transfer up to $10,000,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units in FY 2019. Included $134,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

[13] The FY 2020 Budget proposed that the total LAE budget authority request of $12,773,000,000 be offset by fees collected for replacement Social Security cards (estimated at $270,000,000). The total included $1,582,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base

funding and $1,309,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74) to remain available until March 31, 2021. In FY 2020, the Budget proposed to transfer up to $10,000,000 of program integrity cap adjustment funds in the LAE account to the OIG for the costs associated with jointly operated CDI units. Included up to $130,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

[14] H.R. 2740.

[15] The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which provided the FY 2020 President's Budget request of $12,773,000,000.

[16] Further Consolidated Appropriations Act, 2020 (P.L. 116-94). The total included $45,000,000 to remain available until expended for IT modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with IT modernization. The total included $100,000,000 in available funding through September 30, 2021, for activities to address the hearings backlog within the Office of Hearings Operations. The total also included $1,582,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,309,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74) to remain available for 18 months through March 31, 2021. P.L. 116-94 allowed us to transfer up to $10,000,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units in FY 2020. The total also included $130,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[17] The Coronavirus Aid, Relief, and Economic Security (CARES) Act (P.L. 116-136) provided $300,000,000 in funding, available through September 30, 2021, to prevent, prepare for, and respond to the coronavirus, including paying the salaries and benefits of all employees affected as a result of office closures, telework, phone and communication services for employees, overtime costs, supplies, and for resources necessary for processing disability and retirement workloads and backlogs. It also provided $38,000,000 for administrative costs related to assisting the Department of Treasury/Internal Revenue Service in coordinating a public awareness campaign and administering economic impact payments (EIPs) to qualifying individuals.

[18] The FY 2021 Budget proposed that the total requested LAE budget authority of $13,351,473,000 be offset by fees collected for replacement Social Security cards (estimated at $270,000,000). The total included $1,575,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,302,000,000 in funds outside the discretionary caps, as authorized by the BBA of 2015 (P.L.114-74) to remain available until March 31, 2022. The Budget proposed allowing us to transfer up to $11,200,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units in FY 2021. The total included up to $135,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[19] H.R.7614.

[20] The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which included $12,868,945,000 for LAE.

[21] Consolidated Appropriations Act, 2021 (P.L. 116-260). The total included $45,000,000 to remain available until expended for IT modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with IT modernization. The total included $50,000,000 in available funding through September 30, 2022, for activities to address the hearings backlog within the Office of Hearings Operations. The total also included $1,575,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,302,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74) to remain available for 18 months through March 31, 2022. P.L. 116-260 allowed for the transfer of up to $11,200,000 of program integrity funds from the

LAE account to the OIG for the costs associated with jointly operated CDI units. The total also included $135,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[22] The Consolidated Appropriations Act, 2021 (P.L. 116-260, Section 272, Division N) provided $38,000,000 in funding, available through September 30, 2021, for administrative costs related to assisting the Department of Treasury/Internal Revenue Service in coordinating a public awareness campaign and administering a second round of EIPs first authorized under the CARES Act.

[23] The FY 2022 Budget included $1,708,000,000 in dedicated program integrity funding, including a $1,435,000,000 allocation adjustment, to remain available until March 31, 2023. Dedicated program integrity funding allowed us to conduct CDRs and SSI redeterminations to confirm that participants remain eligible to receive benefits, and it supported anti-fraud CDI units and special attorneys for fraud prosecutions. The Budget proposed transferring up to $12,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total included up to $138,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[24] H.R. 4502.

[25] The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which included $13,967,945,000 for LAE.

[26] Consolidated Appropriations Act, 2022 (P.L. 117-103). The total included $55,000,000 in available funding through September 30, 2023, for activities to address the hearings backlog within the Office of Hearings Operations. The total also included $1,708,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and $1,435,000,000 in funds outside the discretionary caps as authorized by the BBA of 2015 (P.L.114-74) to remain available for 18 months through March 31, 2023. P.L. 117-103 allowed us the ability to transfer up to $12,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total also included $138,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[27] The FY 2023 Budget included $1,799,000,000 in dedicated program integrity funding, including a $1,511,000,000 allocation adjustment, to remain available until March 31, 2024. Dedicated program integrity funding allowed us to conduct CDRs and SSI redeterminations to confirm that participants remain eligible to receive benefits, and it supported anti-fraud CDI units and special attorneys for fraud prosecutions. The Budget proposed transferring up to $15,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total included up to $140,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[28] H.R. 8295.

[29] The Senate Committee on Appropriations did not report a bill. The Committee posted a draft bill which included $14,244,014,000 for LAE.

[30] Consolidated Appropriations Act, 2023 (P.L. 117-328). The total included $55,000,000 in available funding through September 30, 2024, for activities to address the disability hearings backlog within the Office of Hearings Operations. The total also included $1,784,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and a $1,511,000,000 adjustment to remain available for 18 months through March 31, 2024. P.L. 117-328 provided a transfer of up to $15,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total also included $140,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[31] The FY 2024 Budget included $50,000,000 in no-year funding in the LAE account to modernize our benefits

system. The FY 2024 Budget also included $2,000,000 for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure available through September 30, 2025, of which, $700,000 was for the OIG for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure. The FY 2024 Budget proposed $1,870,000,000 in dedicated program integrity funding, including $287,000,000 in base program integrity funding and a $1,583,000,000 allocation adjustment, to remain available until March 31, 2025. Dedicated program integrity funding allows us to conduct CDRs and SSI redeterminations to confirm that participants remain eligible to receive benefits, and it supports anti-fraud CDI units and SAUSAs for fraud prosecutions. The Budget proposed transferring $19,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total included up to $150,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[32] H.R. 5894. The House bill was passed at the subcommittee level and did not go to the full committee.

[33] S. 2624

[34] Further Consolidated Appropriations Act, 2024 (P.L. 118-47). The total included $1,851,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and a $1,578,000,000 allocation adjustment to remain available for 18 months through March 31, 2025. P.L. 118-47 provided a transfer of up to $15,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total also included up to $150,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[35] The FY 2025 Budget included $50,000,000 in no-year funding in the LAE account to modernize our benefits system. The FY 2025 Budget also included $2,000,000 for the purchase and hire of zero emission vehicles and supporting charging or fueling infrastructure available through September 30, 2026, of which $700,000 is for the OIG for the purchase and hire of zero emission passenger motor vehicles and supporting charging or fueling infrastructure. The FY 2025 Budget proposed $1,903,000,000 in dedicated program integrity funding, including $273,000,000 in base program integrity funding and a $1,630,000,000 cap adjustment, to remain available until March 31, 2026. Dedicated program integrity funding allows us to conduct CDRs and SSI redeterminations to confirm that participants remain eligible to receive benefits, and it supports anti-fraud CDI units and SAUSAs for fraud prosecutions. The Budget proposed transferring $19,600,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total included up to $170,000,000 for SSI State Supplement user fees, and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[36] H.R. 9029

[37] S. 4942

[38] Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4). The total includes $1,903,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and a $1,630,000,000 cap adjustment to remain available for 18 months through March 31, 2026. P.L. 119-4 provides a transfer of up to $15,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total also includes up to $170,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[39] The FY 2026 Budget included $2,397,000,000 in dedicated program integrity funding, including $273,000,000 in base program integrity funding and a $2,124,000,000 adjustment, to remain available until March 31, 2027. Dedicated program integrity funding covers the costs associated with CDRs and SSI redeterminations, anti-fraud CDI units, and SAUSAs for fraud prosecutions. The Budget proposes transferring $24,600,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The

total includes up to $170,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[40] H.R. 5304

[41] S. 2587

[42] Consolidated Appropriations Act, 2026 (P.L. 119-75). The total included $2,397,000,000 in dedicated program integrity funding, including the costs associated with SSI redeterminations, full medical CDRs, work CDRs, CDI units, and the prosecution of fraud by SAUSAs, comprised of $273,000,000 in base funding and a $2,124,000,000 allocation adjustment to remain available for 18 months through March 31, 2027. P.L. 119-75 provided a transfer of up to $24,600,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total also included up to $170,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

[43] The FY 2027 Budget includes $2,397,000,000 in dedicated program integrity funding, including $273,000,000 in base program integrity funding and a $2,124,000,000 adjustment, to remain available until March 31, 2028. Dedicated program integrity funding covers the costs associated with CDRs and SSI redeterminations, anti-fraud CDI units, and SAUSAs for fraud prosecutions. The Budget proposes transferring $25,100,000 of program integrity funds from the LAE account to the OIG for the costs associated with jointly operated CDI units. The total includes up to $175,000,000 for SSI State Supplement user fees and up to $1,000,000 from fees collected pursuant to section 303(c) of the SSPA.

SSA-RELATED LEGISLATION FROM JANUARY 2025 TO FEBRUARY 2026

Fiscal Year (FY) 2025

Government Service Delivery Improvement Act (P.L. 118-231, enacted January 4, 2025)

- The law requires the Office of Management and Budget (OMB) to designate or appoint a senior official within OMB as the Federal Government Service Delivery Lead and requires the head of each federal agency to designate a senior official to be responsible for improving the agency's government service delivery.

Social Security Fairness Act of 2023 (P.L. 118-273, enacted January 5, 2025)

- The law repeals the Windfall Elimination Provision and Government Pension Offset provision, both of which could reduce Social Security benefits when someone received a pension based on work that was not covered by Social Security.

Full-Year Continuing Appropriations and Extensions Act, 2025 (P.L. 119-4, enacted March 15, 2025)

- The law provides continuing FY 2025 appropriations for federal agencies through September 30, 2025, and funds most programs and activities at the FY 2024 levels, including SSA.
- The law also extends various expiring programs and authorities.

One Big Beautiful Bill Act (P.L. 119-21, enacted July 4, 2025)

- The law changes how SSA will determine entitlement to and enrollment in Medicare, requires State use of the Death Master File in the administration of medical assistance plans, and makes prior changes to Achieving a Better Life Experience accounts permanent.

FY 2026

Continuing Appropriations, Agriculture, Legislative Branch, Military Construction and Veterans Affairs, and Extensions Act, 2026 (P.L. 119-37, enacted November 12, 2025)

- The law provides FY 2026 continuing appropriations for most federal agencies, including SSA, through January 30, 2026, and provides appropriations through the end of FY 2026 for agriculture, military construction and veterans affairs, and legislative branch programs.
- The law also extends various expiring programs and authorities.

Consolidated Appropriations Act, 2026 (P.L. 119-75, enacted February 2, 2026)

- The law provides FY 2026 appropriations to several federal departments and agencies, including SSA, for the remainder of FY 2026, and provides continuing FY 2026 appropriations for the Department of Homeland Security through February 13, 2026.
- The law also extends various expiring programs and authorities.

Ending Improper Payments to Deceased People Act (P.L. 119-77, enacted February 10, 2026)

- The law amends section 205(r) of the Social Security Act to permanently allow the Department of the Treasury to access certain death records maintained by SSA to facilitate the identification, prevention, and recovery of improper payments.
- Specifically, the law makes permanent the requirement for SSA to share its Death Master File with the Department of Treasury's Bureau of Fiscal Service, who operates the Do Not Pay working system.
- The law also mandates a cost-sharing agreement between SSA and the Department of Treasury, adds evidentiary requirements prior to SSA recording a death, and provides SSA with authority to send notifications to certain agencies upon identification of an error.

GENERAL STATEMENT/BUDGETARY RESOURCES/PERFORMANCE

LIMITATION ON ADMINISTRATIVE EXPENSES OVERVIEW

The Limitation on Administrative Expenses (LAE) account funds our operating expenses to administer our three major programs—Old-Age and Survivors Insurance (OASI), Disability Insurance (DI), and Supplemental Security Income (SSI)—as well as certain health insurance and Medicare prescription drug functions and the Special Benefits for Certain World War II Veterans program. We utilize LAE funds to carry out our core mission, including processing benefit applications, conducting hearings and appeals, protecting our customers through the prevention of fraud, and completing program integrity work to strengthen our programs. With LAE account funds, we provide vital services to millions of Americans in our field offices, over the phone, and online at www.ssa.gov.

Please see the Budget Overview for more information.

SIZE AND SCOPE OF OUR PROGRAMS

Our administrative budget is driven by the programs we administer—in terms of both the amount of work performed and the number of people needed to process it—and by our continuing efforts to improve service, efficiency, and stewardship.

Between the three major programs we administer—OASI, DI, and SSI—benefit payment outlays totaled over $1.6 trillion in FY 2025; and under current law, we expect benefit payment outlays to be approximately $1.7 trillion in FY 2026 and $1.8 trillion in FY 2027. This includes the SSI State supplementary payments that we administer on behalf of some States.

Table 3.8—Benefit Outlays[18]
(Dollars in billions)

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Estimate
Old-Age and Survivors Insurance	$1,411.2	$1,494.0	$1,579.6
Disability Insurance	$157.3	$168.9	$178.0
Supplemental Security Income[19,20]	$67.9	$71.0	$73.2
Total Outlays[21]	**$1,636.3**	**$1,734.0**	**$1,830.8**

We expect the total number of beneficiaries and recipients of the three major programs we administer to increase from 76.5 million in FY 2025 to 78.4 million in FY 2026 and 79.9 million in FY 2027. We expect OASI beneficiaries and SSI recipients to increase in FY 2026 and FY 2027, while we expect DI beneficiaries to slightly decrease in FY 2026 and then increase in FY 2027.

Table 3.9—Beneficiaries
(Average in payment status, in millions)

	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
Old-Age and Survivors Insurance	60.8	62.7	64.0
Disability Insurance	8.3	8.2	8.4
Supplemental Security Income[22]	7.4	7.5	7.5
Total Beneficiaries[23]	**76.5**	**78.4**	**79.9**

[18] Totals may not add due to rounding.
[19] SSI benefit payments include State supplementary payments of around $3.4 billion in FY 2025, $3.4 billion in FY 2026, and $3.5 billion in FY 2027.
[20] There were 12 monthly benefit payments in FY 2025, and there will be 12 in both FY 2026 and FY 2027.
[21] Benefit payment totals include less than $500,000 for the Special Benefits for Certain World War II Veterans program in FYs 2025, 2026, and 2027, which is not broken out separately.
[22] SSI recipients include about 130,000 recipients in FY 2025, 131,000 in FY 2026, and 137,000 in FY 2027 who only receive a State supplementary payment.
[23] Beneficiary totals include approximately 2.6 million concurrent recipients who receive SSI as well as OASI or DI.

FUNDING REQUEST

Our FY 2027 LAE budget request of $14.869 billion supports our digital-first strategy to modernize IT, expand automation, and enhance self-service options. With this funding, we will improve the customer experience, reduce wait times, strengthen program integrity, and optimize workforce productivity, ensuring efficient and secure service for the American public.

Table 3.10—Budgetary Request[24]
(Dollars in millions)

	FY 2025 Actual	FY 2026 Enacted	FY 2027 Request
Budget Authority, One-Year (in millions)			
Limitation on Administrative Expenses (LAE)[25]	$14,299	$14,843	$14,869
(Dedicated Program Integrity Level, Base and Adjustment, included in LAE)[26, 27]	*($1,903)*	*($2,397)*	*($2,397)*
Research and Demonstrations[28, 29]	$91	$91	$70
Office of the Inspector General (OIG)[30]	$115	$115	$115
Budget Authority, Total	**$14,505**	**$15,049**	**$15,054**
Workyears (WY)			
Full-Time Equivalents	54,063	51,205	51,820
Overtime	1,499	3,133	1,957
Lump Sum Leave	400	284	214
Total SSA Workyears[31]	**55,962**	**54,622**	**53,991**
Disability Determination Services (DDS)	13,017	12,561	12,755
Total SSA/DDS Workyears	**68,979**	**67,183**	**66,746**
OIG	482	460	478
Total SSA/DDS/ OIG Workyears	**69,461**	**67,643**	**67,224**

[24] Totals may not add due to rounding.
[25] LAE funding includes $170 million in FY 2025, $170 million in FY 2026, and $175 million in FY 2027 for SSI user fees. LAE funding also includes $1 million in Social Security Protection Act (SSPA) user fees.
[26] P.L 119-4 – Full-Year Continuing Appropriations and Extensions Act, 2025 and P.L. 119-75 – Consolidated Appropriations Act, 2026 provided program integrity funding availability for 18 months (through March 31). The FY 2027 President's Budget assumes appropriations language for FY 2027 will provide for similar 18-month authority to obligate PI funds.
[27] P.L. 119-4 and P.L. 119-75 allows SSA to transfer $15.1 million and $24.6 million in FY 2025 and FY 2026, respectively, from the LAE account to the OIG for the costs associated with jointly operated CDI units. The FY 2027 President's Budget assumes a transfer of $25.1 million in FY 2027.
[28] These amounts include $7 million in base research funding classified as mandatory.
[29] Congress appropriated $91 million in FY 2025 (available through September 30, 2027) and $91 million in FY 2026 (available through September 30, 2028) for research and demonstration projects. The FY 2027 President's Budget assumes $70 million in FY 2027 (available through September 30, 2029) for research and demonstration projects.
[30] OIG funds do not include transfers from the SSA LAE account, Dedicated Program Integrity, to the OIG for the costs associated with jointly operated CDI units.
[31] A workyear (WY) is a measure of time spent doing work or being paid for some element of time (e.g., leave). It is the equivalent of one person working for one year (2,080 hours) and may consist of regular hours, overtime, or lump sum leave, which is payment for unused annual leave upon leaving the agency. WYs include time spent in full-time or part-time employment. Full-time equivalents and overtime WYs include those funded from dedicated funding to reduce the hearings backlog, dedicated funding for IT modernization, and dedicated funding for PI. Full-time equivalents include those funded by the CDI unit PI transfer from the LAE account to the OIG.

ALL PURPOSE TABLE

Table 3.10—All Purpose Table (APT)[32]

(in thousands)

	FY 2025	FY 2026	FY 2027	
	Full-Year Continuing Appropriations and Extensions Act	Consolidated Appropriations Act	President's Budget	FY 2027 +/- FY 2026
	P.L. 119-4	P.L. 119-75		
Payments to Social Security Trust Funds				
Pension Reform	6,000	6,000	6,000	-
Unnegotiated Checks	9,000	9,000	9,000	-
Total PTF	**$15,000**	**$15,000**	**$15,000**	**-**
Supplemental Security Income				
Federal Benefits Payment	62,228,000	66,762,000	70,389,000	3,627,000
Beneficiary Services	137,000	75,000	75,000	-
Research & Demonstration [33,34]	91,000	91,000	70,000	(21,000)
Administration [35]	4,609,042	4,624,282	4,554,254	(70,028)
Subtotal SSI Program Level	**67,065,042**	**71,552,282**	**75,088,254**	**3,535,972**
Advance from PY	(21,700,000)	(22,100,000)	(23,500,000)	(1,400,000)
Subtotal Current Year SSI	**$45,365,042**	**$49,452,282**	**$51,588,254**	**$2,135,972**
New Advance SSI	**$22,100,000**	**$23,500,000**	**$24,000,000**	**$500,000**
Limitation on Administrative Expenses				
Regular LAE				
OASDI Trust Funds	5,627,076	5,736,069	5,751,056	14,987
HI/SMI Trust Funds	3,364,226	3,636,530	3,696,335	59,805
Social Security Advisory Board	2,700	2,700	-	(2,700)
SSI	3,230,976	2,899,679	2,848,587	(51,092)
Subtotal Regular LAE	**$12,224,978**	**$12,274,978**	**$12,295,978**	**$21,000**
Program Integrity Funding				
OASDI Trust Funds	524,934	672,397	691,333	18,936
SSI	1,378,066	1,724,603	1,705,667	(18,936)
Subtotal Program Integrity Funding [36]	**$1,903,000**	**$2,397,000**	**$2,397,000**	**-**
Base Program Integrity	*273,000*	*273,000*	*273,000*	-
Adjustment [37]	*1,630,000*	*2,124,000*	*2,124,000*	-
User Fees				
SSI User Fee	170,000	170,000	175,000	5,000
SSPA User Fee	1,000	1,000	1,000	-
Subtotal User Fees	**$171,000**	**$171,000**	**$176,000**	**$5,000**
Total LAE	**$14,298,978**	**$14,842,978**	**$14,868,978**	**$26,000**
Non-PI LAE	12,395,978	12,445,978	12,471,978	26,000
Office of the Inspector General				
Federal Funds	32,000	32,000	32,000	-
Trust Funds	82,665	82,665	82,665	-
Total, OIG [38,39]	**$114,665**	**$114,665**	**$114,665**	**-**
Total, Social Security Administration, New BA	$77,284,643	$83,300,643	$86,032,643	$2,732,000
Federal Funds	$67,683,042	$73,170,282	$75,811,254	$2,640,972
Current Year	$45,583,042	$49,670,282	$51,811,254	$2,140,972
New Advance	$22,100,000	$23,500,000	$24,000,000	$500,000
Trust Funds	$9,601,601	$10,130,361	$10,221,389	$91,028

[32] Totals may not add due to rounding.

[33] These amounts include $7 million in base research funding classified as mandatory.

[34] P.L. 119-4 - The Full-Year Continuing Appropriations and Extensions Act, 2025 provides 3-year authority for research and demonstration projects, with FY 2025 funds available through September 30, 2027. P.L. 119-75 – Consolidated Appropriations Act, 2026 also provides 3-year authority for research and demonstration projects, with FY 2026 funds available through September 30, 2028. The FY 2027 President's Budget assumes the same authority for FY 2027, extending availability through September 30, 2029.

[35] Total SSI Administration reflects the sum of SSI regular LAE and SSI Program Integrity included in the LAE section.

[36] P.L. 119-4 – The Full-Year Continuing Appropriations and Extensions Act, 2025 provides 18-month authority to obligate PI funds through March 31, 2026. P.L. 119-75 - Consolidated Appropriations Act, 2026 also provides 18-month authority to obligate PI funds through March 31, 2027. The FY 2027 President's Budget assumes similar authority for FY 2027, with obligation period through March 31, 2028.

[37] P.L. 119-4 - The Full-Year Continuing Appropriations and Extensions Act, 2025 allows SSA to transfer $15.1 million in FY 2025 from the LAE account to the OIG for the costs associated with jointly operated CDI units. P.L. 119-75 – Consolidated Appropriations Act, 2026 allows SSA to transfer $24.6 million in FY 2026 from the LAE account to the OIG for the costs associated with jointly operated CDI units. The FY 2027 President's Budget proposes a $25.1 million transfer.

[38] P.L. 119-4 - The FY Full-Year Continuing Appropriations and Extension Act, 2025, P.L. -119-75 – Consolidated Appropriations Act, 2026, and the FY 2027 President's Budget include $2 million each in the OIG topline, which will remain available until expended for information technology modernization, including related hardware and software infrastructure and equipment, and for administrative expenses directly associated with information technology modernization.

[39] OIG funds do not include transfers from the SSA LAE account, Dedicated Program Integrity, to the OIG for the costs associated with jointly operated CDI units.

SSI STATE SUPPLEMENTATION/IMPACT OF STATES DROPPING OUT

The SSI program was designed to provide a nationwide uniform floor of cash assistance to individuals who are aged, blind, and disabled, with limited income and resources. In recognizing that there were variations in living costs across the Nation, Congress added section 1618 to the Social Security Act to encourage States to supplement the Federal payment. This ensured that SSI recipients received the full benefit of each cost-of-living adjustment. States may administer their own State supplement programs or have us administer the programs on their behalf. States electing to have us administer their programs reimburse us monthly in advance for these benefit payments, and we make eligibility determinations and payments on behalf of the States.

Table 3.11—State Supplement Payments
(Dollars in millions)

	FY 2025 Actual	FY 2026 Enacted	FY 2027 Estimate
Federally Administered State Supplement Payments	$3,415	$3,410	**$3,520**
Offsetting Collections	$3,420	$3,419	**$3,532**

Participating States pay us user fees to administer their programs, based on a schedule established by the Social Security Act. The user fee was $15.22 per SSI payment in FY 2025 and is $15.63 in FY 2026. We estimate that the user fee will increase to $16.05 per payment in FY 2027. The Department of Treasury receives the first $5.00 of each fee and we retain the amount over $5.00. This user fee is discretionary budget authority that supplements our LAE account.

Table 3.12—SSI User Fee Collections[40,41]
(Dollars in millions)

	FY 2025 Actual	FY 2026 Enacted	FY 2027 Estimate	*FY 2026 to FY 2027 Change*
SSA User Fee Collections	$164	$170	**$175**	*+$5*
Treasury User Fee Collections	$80	$81	**$82**	*+$1*
Total User Fee Collections	$244	$251	**$257**	*+$6*

[40] The enacted user fee authority was $170,000,000 for FY 2025 and estimated at $170,000,000 for FY 2026. Any fees collected in excess of the appropriated amount may be used to cover a shortfall in collections for future years.
[41] FY 2025, FY 2026, and FY 2027 have 12 payments.

Impact of States Dropping Out of State Supplementation Program

Currently, we help administer the State supplementation for 20 States and the District of Columbia. However, participation in the State supplementation program is voluntary. States can opt out of the program but must provide notice to us at least 90 days in advance before dropping out. The result of States dropping out of the program is a loss of LAE authority in the current fiscal year and possibly the following fiscal year when it is too late to adjust our request. When a State drops out of the program, we use LAE to make up the difference in authority. We adjust our estimates for the budget year and the outyears, when possible, to accommodate any changes. California and New Jersey are the two States with the highest collections for whom we administer State supplementation. If either State opted to administer their own State supplementation, our estimate would dramatically decrease.

Table 3.13—Estimated SSA User Fee Collections by State
(Dollars in thousands)

State	FY 2025 Actual	FY 2026 Enacted	FY 2027 Estimate
Arkansas	*	*	*
California	$137,693	$142,614	$145,818
Delaware	$64	$69	$73
District of Columbia	$116	$118	$126
Georgia	$1	*	*
Hawaii	$257	$273	$291
Iowa	$96	$95	$101
Kansas	*	*	*
Louisiana	*	*	*
Maryland	*	*	*
Michigan	$1,287	$1,332	$1,419
Mississippi	$1	$1	$1
Montana	$66	$67	$71
Nevada	$2,102	$2,202	$2,347
New Jersey	$20,311	$21,064	$22,445
Ohio	*	*	*
Pennsylvania	$423	$420	$448
Rhode Island	$44	$45	$48
South Dakota	*	*	*
Tennessee	$1	$1	$1
Vermont	$1,669	$1,699	$1,811
Total	**$164,131**	**$170,000**	**$175,000**

* Less than $500

BUDGET AUTHORITY AND OUTLAYS

The Limitation on Administrative Expenses (LAE) account, our basic administrative account, is an annual appropriation and is financed from the Social Security and Medicare trust funds, the General Fund, and applicable user fees. This account provides resources to administer the Social Security and Supplemental Security Income (SSI) programs, as well as certain aspects of the Medicare program.

Section 201(g) of the Social Security Act provides that SSA determine the share of administrative expenses that should have been borne by the appropriate trust funds for the administration of their respective programs and the General Fund for administration of the SSI program. We calculate the administrative costs attributable to each program using our Government Accountability Office approved Cost Analysis System (CAS). SSA and CMS continue to work together to evaluate the cost-sharing agreement that determines the portion of administrative expenses borne by the SSA and Medicare trust funds and the General Fund.

In addition to our base operating expenses, we occasionally receive one-time appropriations. In FY 2009, we received additional funds from the General Fund of the Treasury, provided by the Recovery Act and the Medicare Improvement for Patients and Providers Act (MIPPA). We also received $98 million funded incrementally from FY 2015 to FY 2018, of which $27 million is available until expended, for costs associated with the Medicare Access and CHIP Reauthorization Act (MACRA) provisions. In FY 2022, we received $16 million for the Postal Service Reform Act (PSRA) to assist the Office of Personnel Management (OPM) and the United States Postal Service (USPS) with outreach, program eligibility and inquiries, and administering a special Medicare enrollment period for Postal Service employees, Postal Service annuitants and their family members.

Table 3.14—Budget Authority and Outlays[42]
(Dollars in thousands)

	FY 2025 Actual	FY 2026 Enacted	FY 2027 Estimate
Budget Authority			
OASI and DI Trust Funds	$6,152,010[42]	$6,408,466[43]	$6,442,389[44]
HI and SMI Trust Funds	$3,364,226	$3,636,530	$3,696,335
SSA Advisory Board	$2,700	$2,700	$0
SSI Administrative Expenses	$4,609,042	$4,624,282	$4,554,254
SSI State Supplement User Fees	$170,000	$170,000	$175,000
Non-Attorney Representative User Fees	$1,000	$1,000	$1,000
Technology Modernization Funds (TMF)	$8,000	$0	$0

Limitation on Administrative Expenses

	FY 2025 Actual	FY 2026 Enacted	FY 2027 Estimate
Total Budget Authority	**$14,306,978**	**$14,842,978**	**$14,868,978**
Administrative Outlays			
OASI and DI Trust Funds	$6,285,600[45]	$6,457,900[46]	$6,517,000[47]
HI and SMI Trust Funds	$3,690,300	$3,663,000	$3,736,000
SSI Administrative Expenses	$4,839,300	$4,659,000	$4,607,000
SSI State Supplement User Fees	$170,000	$170,000	$175,000
Non-Attorney Representative User Fees	$1,000	$1,000	$1,000
MIPPA – LIS	$0[48]	$0	$0
Postal Service Recovery Act (PSRA)	$800	$0	$0
Medicare Improvement for Patients and Providers Act (MACRA)	$0	$0	$0
Technology Modernization Fund (TMF)	$7,900	$0[49]	$0
Total Administrative Outlays[50]	**$14,994,900**	**$14,950,900**	**$15,036,000**

[42] Totals may not add due to rounding.

[42] The total includes $3,642,539 in OASI and $2,509,471 in DI budget authority.

[43] The total includes $3,559,058 in OASI and $2,849,408 in DI budget authority.

[44] The total includes $3,574,917 in OASI and $2,867,472 in DI budget authority.

[45] The total includes $3,676,300 in OASI and $2,609,300 in DI outlays.

[46] The total includes $3,587,800 in OASI and $2,870,100 in DI outlays.

[47] The total includes $3,618,000 in OASI and $2,899,000 in DI outlays.

[48] A total of $26,900 was outlaid in MIPPA-LIS.

[49] In FY 2026, we expect to return TMF funds to GSA.

[50] Outlays are from the LAE account. Outlay totals include outlays made from budget authority enacted in prior years. Due to variations in timing in the reporting of outlays, these outlays will not match those included in the Budget Appendix.

AMOUNTS AVAILABLE FOR OBLIGATION/ANALYSIS OF CHANGES

Table 3.15—Amounts Available for Obligation[51,52,53]

(Dollars in thousands)

	FY 2025[54] Actual	FY 2026[55] Enacted	FY 2027[56] Estimate	FY 2026 to FY 2027 Change
Limitation on Administrative Expenses (LAE)				
Unobligated Balance, start-of-year[57]	$523,446	$316,420	$316,789	$369
Unrealized Non-Attorney User Fees	-$841	$0	$0	$0
Unrealized SSI User Fees	$0	$0	$0	$0
LAE Appropriation	$14,298,978	$14,842,978	$14,868,978	$26,000
Subtotal LAE Resources	$14,821,583	$15,159,398	$15,185,767	$26,369
Total Obligations, LAE	**$14,285,900**	**$15,042,609**	**$15,054,919**	**$12,310**
Unobligated Balance, lapsing	-$181,306	$0	$0	$0
Unobligated Balance, end-of-year (LAE Carryover)	$354,377	$116,789	$130,848	$14,059
Medicare Improvements for Patients and Providers Act (MIPPA) – Medicare Savings Plan (MSP)				
Unobligated Balances, start-of-year	$14,903	$14,903	$14,903	$0
Obligations, MIPPA – MSP	**$0**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$14,903	$14,903	$14,903	$0
MIPPA - Low Income Subsidy (LIS)				
Unobligated Balances, start-of-year	$11,263	$11,236	$11,236	$0
Obligations, MIPPA – LIS	**$27**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$11,236	$11,236	$11,236	$0
State Children's Health Insurance Program (SCHIP)				
Unobligated Balances, start-of-year	$1,868	$1,842	$1,842	$0
Obligations, MIPPA – SCHIP	**$26**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$1,842	$1,842	$1,842	$0
Medicare Access and CHIP Reauthorization Act (MACRA)				
Unobligated Balances, start-of-year	$25,982	$25,982	$25,982	$0

[51] Totals may not add due to rounding.
[52] Table does not include reimbursables, Technology Modernization Fund, or Vehicle Recharging Station funding.
[53] Due to variations in timing in the reporting of obligations, these obligations may not match those included in the Budget Appendix.
[54] FY 2025 unobligated balances, end-of-year, include approximately $112,000,000 of Program Integrity 18-month carry-out, and $242,000,000 carryover/transferred from prior-year accounts.
[55] FY 2026 unobligated balance, start-of-year, includes approximately $112,000,000 of Program Integrity 18-month funds and $204,000,000 transferred from prior-year accounts.
[56] FY 2027 unobligated balance, start-of-year, includes approximately $112,000,000 of Program Integrity 18-month funds and $204,000,000 transferred from prior-year accounts.
[57] Includes multi-year carryover funds and recoveries for IT Systems, and dedicated Program Integrity funding.

Limitation on Administrative Expenses

Obligations, MACRA	**$0**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$25,982	$25,982	$25,982	$0
Postal Service Reform Act of 2022 (PSRA)				
Unobligated Balances, start-of-year	$12,334	$11,648	$11,648	$0
Obligations, PSRA	**$686**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$11,648	$11,648	$11,648	$0
GRAND TOTAL, OBLIGATIONS	**$14,286,639**	**$15,042,609**	**$15,054,919**	**$12,310**

SUMMARY OF CHANGE IN ADMINISTRATIVE BUDGET AUTHORITY FROM FY 2026 TO FY 2027

Table 3.16—Summary of Change in Administrative Budget Authority from FY 2026 to FY 2027

		FY 2026	FY 2027	Change
MAJOR CATEGORIES – This section (not included in totals and subtotals below) attempts to crosswalk the major spending categories shown below (dollars in thousands)				
I.	**Payroll Expenses**	**$ 7,904,958**	**$ 7,990,289**	**$ 85,331**
	Built-In Increase	$ -	$ 177,720	$ 177,720
	Program Increase	$ -	$ (92,389)	$ (92,389)
II.	**Non-Payroll Expenses**	**$ 2,560,000**	**$ 2,457,534**	**$ (102,466)**
	Built-In Increase	$ -	$ (102,466)	$ (102,466)
	Program Increase		$ 0	$ 0
III.	**Disability Determination Services**	**$ 2,563,420**	**$ 2,686,055**	**$ 122,635**
	Built-In Increase	$ -	$ 58,257	$ 58,257
	Program Increase	$ -	$ 64,378	$ 64,378
IV.	**Information Technology Systems**	**$ 1,790,000**	**$ 1,710,000**	**$ (80,000)**
	Built-In Increase		$ 0	$ 0
	Program Increase		$ (80,000)	$ (80,000)
IV.	**OIG Reimbursable Transfer**	**$ 24,600**	**$ 25,100**	**$ 500**
Total, Budget Authority		**$ 14,842,978**	**$ 14,868,978**	**$ 26,000**

AMOUNTS AVAILABLE FOR OBLIGATION/ANALYSIS OF CHANGES

Table 3.17—Amounts Available for Obligation[58,59,60]
(Dollars in thousands)

	FY 2025[61] Actual	FY 2026[62] Enacted	FY 2027[63] Estimate	FY 2026 to FY 2027 Change
Limitation on Administrative Expenses (LAE)				
Unobligated Balance, start-of-year[64]	$523,446	$316,420	$316,789	$369
Unrealized Non-Attorney User Fees	-$841	$0	$0	$0
Unrealized SSI User Fees	$0	$0	$0	$0
LAE Appropriation	$14,298,978	$14,842,978	$14,868,978	$26,000
Subtotal LAE Resources	$14,821,583	$15,159,398	$15,185,767	$26,369
Total Obligations, LAE	**$14,285,900**	**$15,042,609**	**$15,054,919**	**$12,310**
Unobligated Balance, lapsing	-$181,306	$0	$0	$0
Unobligated Balance, end-of-year (LAE Carryover)	$354,377	$116,789	$130,848	$14,059
Medicare Improvements for Patients and Providers Act (MIPPA) – Medicare Savings Plan (MSP)				
Unobligated Balances, start-of-year	$14,903	$14,903	$14,903	$0
Obligations, MIPPA – MSP	**$0**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$14,903	$14,903	$14,903	$0
MIPPA - Low Income Subsidy (LIS)				
Unobligated Balances, start-of-year	$11,263	$11,236	$11,236	$0
Obligations, MIPPA – LIS	**$27**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$11,236	$11,236	$11,236	$0
State Children's Health Insurance Program (SCHIP)				
Unobligated Balances, start-of-year	$1,868	$1,842	$1,842	$0
Obligations, MIPPA – SCHIP	**$26**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$1,842	$1,842	$1,842	$0
Medicare Access and CHIP Reauthorization Act (MACRA)				
Unobligated Balances, start-of-year	$25,982	$25,982	$25,982	$0

[58] Totals may not add due to rounding.

[59] Table does not include reimbursables, Technology Modernization Fund, or Vehicle Recharging Station funding.

[60] Due to variations in timing in the reporting of obligations, these obligations may not match those included in the Budget Appendix.

[61] FY 2025 unobligated balances, end-of-year, include approximately $112,000,000 of Program Integrity 18-month carry-out, and $242,000,000 carryover/transferred from prior-year accounts.

[62] FY 2026 unobligated balance, start-of-year, includes approximately $112,000,000 of Program Integrity 18-month funds and $204,000,000 transferred from prior-year accounts.

[63] FY 2027 unobligated balance, start-of-year, includes approximately $112,000,000 of Program Integrity 18-month funds and $204,000,000 transferred from prior-year accounts.

[64] Includes multi-year carryover funds and recoveries for IT Systems, and dedicated Program Integrity funding.

Obligations, MACRA	**$0**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$25,982	$25,982	$25,982	$0
Postal Service Reform Act of 2022 (PSRA)				
Unobligated Balances, start-of-year	$12,334	$11,648	$11,648	$0
Obligations, PSRA	**$686**	**$0**	**$0**	**$0**
Unobligated Balances, end-of-year	$11,648	$11,648	$11,648	$0
GRAND TOTAL, OBLIGATIONS	**$14,286,639**	**$15,042,609**	**$15,054,919**	**$12,310**

SUMMARY OF CHANGE IN ADMINISTRATIVE OBLIGATIONS FROM FY 2026 TO FY 2027

Table 3.18—Summary of Change in Administrative Obligations from FY 2026 to FY 2027
Summary of Changes
(Dollars in thousands)[65,66]

	FY 2026	FY 2027		Change	
	Obligations (thousands)	Federal WYs	Obligations (thousands)	Federal WYs	Obligations (thousands)
BUILT-IN INCREASES – Built-in increases are year-over-year cost increases that are outside of agency control, such as changes in employee health benefit premiums and the price of postage, for instance. These increases are not a result of fluctuations in overall agency resources or agency program or policy changes. Most agency operational costs are captured in this category as payroll costs. To isolate built-in increases from effects of other changes, all figures shown in this section represent the changing costs associated with maintaining prior-year workyear levels. Cost changes resulting from changes in workyear levels are captured in the Program Changes section.					
A1. **Payroll Expenses**	**$7,904,589**		**$8,082,309**		**$177,720**
Increases due to periodic step increases, health benefits, and career ladder promotions			$156,263		$156,263
Three-month effect of Federal pay increase of 1.0% effective January 2026			$21,457		$21,457
A2. **State Disability Determination Services -** Mandatory growth in state DDS costs, including pay raises and the costs of obtaining medical evidence	**$2,563,420**		**$2,621,677**		**$58,257**
A3. **Mailed Social Security Statements**	**$12,462**		**$13,062**		**$600**
Subtotal, Built-In Increases	**$10,480,471**		**$10,717,048**		**$236,577**
PROGRAM CHANGES – Program changes are year-over-year cost increases or decreases not captured in the section above. These result from changes in agency priorities, policy decisions, efficiencies, or dedicated funding.					

[65] Totals may not add due to rounding.

[66] Figures include Program Integrity

	FY 2026	FY 2027		Change	
	Obligations (thousands)	Federal WYs	Obligations (thousands)	Federal WYs	Obligations (thousands)
PROGRAM INCREASES					
B1. **Net Increase in Disability Determination Services**			$64,378		$64,378
B2. **OIG Reimbursable Transfer for CDI Payroll (funded by PI adjustment)**	$24,600		$25,100		$500
Subtotal, Program Increases	$24,600		$89,478		$64,878
Subtotal, Gross Increases	$10,505,071		$10,806,526		$301,455
PROGRAM DECREASES					
C1. **Information Technology (IT)** (excludes reimbursables)	$1,790,000		$1,710,000		-$80,000
C2. **Non-Payroll Costs**	$2,547,538		$2,444,471		-$103,067
C3. **Payroll Decreases - Net Decrease in SSA WYs**		-631	-$106,078	-631	-$106,078
Subtotal, Program Decreases	$4,337,538	-631	$4,048,393	-631	-$289,145
Subtotal, Gross Decreases	$4,337,538	-631	$4,048,393	-631	-$289,145
NO NET CHANGE					
D1. **IT Obligations Funded from Prior-Year Unobligated Balances**	$200,000		$200,000		$0
Subtotal, No Net Change	$200,000		$200,000		$0
Total Obligations, Net	$15,042,609	-631	$15,054,919	-631	+ 12,310

BUDGETARY RESOURCES BY OBJECT

Table 3.19—Budgetary Resources by Object
(Dollars in thousands)[67,68,69]

	FY 2026	FY 2027	Change
Personnel Compensation			
Permanent positions	$ 5,223,804	$ 5,334,071	$ 110,266
Positions other than permanent	$ 76,883	$ 80,727	$ 3,844
Other personnel compensation	$ 411,714	$ 281,979	$ (129,735)
Special personal service payments	$ 2,000	$ 2,000	$ -
Subtotal, personnel compensation	$ 5,714,402	$ 5,698,777	$ (15,624)
Personnel Benefits	$ 2,211,787	$ 2,299,267	$ 87,480
Benefits for former personnel	$ 3,000	$ 3,000	$ -
Travel and transportation of persons	$ 4,076	$ 4,111	$ 36
Transportation of things	$ 4,620	$ 4,660	$ 40
Rent, communications, and utilities			
Rental payments to GSA	$ 691,302	$ 636,663	$ (54,638)
Rental payments to others	$ 102	$ 88	$ (15)
Communications, utilities, misc.	$ 505,583	$ 428,450	$ (77,133)
Printing and reproduction	$ 39,791	$ 40,138	$ 347
Other contractual services (DDS, guards, etc.)	$ 5,168,244	$ 5,315,982	$ 147,737
Supplies and materials	$ 21,661	$ 21,850	$ 189
Equipment	$ 551,680	$ 474,470	$ (77,210)
Land and structures	$ 18,033	$ 18,191	$ 157
Grants, subsidies, and contributions	$ 49,683	$ 50,116	$ 433
Insurance claims and indemnities	$ 45,680	$ 46,079	$ 398
Financial Transfers	$ 12,965	$ 13,078	$ 113
Total Obligations	**$15,042,609**	**$15,054,919**	**$12,310**
Resources not being obligated in the current year (carrying over or lapsing)	$116,789	$130,848	$14,059
Total Budgetary Resources	**$15,159,398**	**$15,185,767**	**$26,366**
Payments to State DDS (funded from other services and Communications, utilities, and misc.)	$2,546,420	$2,686,055	$139,635

[67] Totals are shown in thousands, do not include reimbursables, and may not add due to rounding.
[68] The obligations include the base LAE appropriation, MIPPA, LIS, SCHIP, MACRA, Postage Reform, and the Altmeyer Renovation. Total budgetary resources in the table reflect FY 2026 and FY 2027 projections of spending by object class. Resources are not managed at the object class level and SSA has the flexibility within the LAE account to modify projected spending during the budget execution process.
[69] These figures do not include Technology Modernization Fund (TMF) funding.

ESTIMATED DISTRIBUTION OF AGENCY COSTS

The Estimated Distribution of Agency Costs exhibit displays SSA's workyears and costs by major component group.

Table 3.20—FY 2025 Estimated Distribution of Agency Costs [70, 71]
(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Workyears	Salaries/ OT	Benefits	Other Objects	Total
Field Operations [72]	26,514	164	594	**27,272**	$2,626,441	$1,060,371	$959,932	**$4,646,743**
Digital Services	3,865	13	18	**3,896**	$279,247	$112,740	$19,515	**$411,502**
Central Operations	8,916	69	543	**9,528**	$842,622	$340,191	$88,330	**$1,271,143**
Disability Adjudication	8,845	81	309	**9,235**	$1,100,726	$428,060	$281,819	**$1,810,605**
Chief Information Officer	3,081	32	23	**3,136**	$437,918	$170,301	$41,565	**$649,784**
Subtotal, Direct Service	**51,221**	**359**	**1,487**	**53,067**	**$5,286,953**	**$2,111,663**	**$1,391,161**	**$8,789,777**
Law and Policy [73]	1,050	16	0	**1,066**	$166,545	$67,239	$178,105	**$411,889**
Agency-Level Support	1,792	25	12	**1,829**	$208,617	$107,059	$757,072	**$1,072,748**
Subtotal, SSA	**54,063**	**400**	**1,499**	**55,962**	**$5,662,115**	**$2,285,961**	**$2,326,339**	**$10,274,414**
ITS				**-**			$1,357,488	**$1,357,488**
DDS	12,797	0	220	**13,017**			$2,638,898	**$2,638,898**
Total, LAE	**66,860**	**400**	**1,719**	**68,979**	**$5,662,115**	**$2,285,961**	**$6,322,725**	**$14,270,800**
OIG Transfer [74]				**-**			$15,100	**$15,100**
Total, LAE and OIG Transfer	**66,860**	**400**	**1,719**	**68,979**	**$5,662,115**	**$2,285,961**	**$6,337,825**	**$14,285,900**

Table 3.21—FY 2026 Estimated Distribution of Agency Costs[70]

(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Work years	Salaries/ OT	Benefits	Other Objects	Total
Field Operations[72]	24,966	111	1,343	**26,420**	$2,615,073	$1,031,850	$970,344	**$4,617,267**
Digital Services	5,231	7	45	**5,283**	$385,967	$152,643	$30,508	**$569,118**
Central Operations	7,268	32	1,120	**8,420**	$766,889	$302,567	$106,779	**$1,176,236**
Disability Adjudication	6,764	38	419	**7,221**	$874,874	$345,035	$304,633	**$1,524,541**
Risk and Quality	1,865	6	168	**2,039**	$255,931	$101,018	$11,517	**$368,466**
Chief Information Officer	2,943	49	26	**3,018**	$443,981	$175,140	$45,345	**$664,466**
Subtotal, Direct Service	**49,038**	**243**	**3,121**	**52,402**	**$5,342,715**	**$2,108,253**	**$1,469,126**	**$8,920,095**
Security and Resiliency	92	3	0	**95**	$13,209	$5,205	$92,674	**$111,089**
Law and Policy[73]	879	13	1	**893**	$143,698	$56,678	$273,268	**$473,643**
Agency-Level Support	1,196	25	11	**1,232**	$141,579	$93,251	$724,931	**$959,762**
Subtotal, SSA	**51,205**	**284**	**3,133**	**54,622**	**$5,641,201**	**$2,263,388**	**$2,560,000**	**$10,464,589**
ITS							$1,990,000	**$1,990,000**
DDS	12,226		335	**12,561**			$2,563,420	**$2,563,420**
Total, LAE	**63,431**	**284**	**3,468**	**67,183**	**$5,641,201**	**$2,263,388**	**$7,113,420**	**$15,018,009**
OIG Transfer[74]							$24,600	**$24,600**
Total, LAE and OIG Transfer	**63,431**	**284**	**3,468**	**67,183**	**$5,641,201**	**$2,263,388**	**$7,138,020**	**$15,042,609**

Table 3.22—FY 2027 Estimated Distribution of Agency Costs[70]

(Dollars in thousands)

Component	FTEs	Lump Sum	Overtime	Work years	Salaries/ OT	Benefits	Other Objects	Total
Field Operations[72]	24,590	89	1,277	**25,956**	$2,597,340	$1,061,758	$1,072,399	**$4,731,497**
Digital Services	5,618	7	45	**5,670**	$420,765	$172,003	$19,528	**$612,297**
Central Operations	7,865	30	128	**8,023**	$743,744	$304,033	$118,399	**$1,166,175**
Disability Adjudication	6,701	35	419	**7,155**	$871,465	$356,243	$217,320	**$1,445,028**
Risk and Quality	1,924	3	50	**1,977**	$250,420	$102,368	$6,946	**$359,734**
Chief Information Officer	2,942	20	26	**2,988**	$445,275	$181,843	$46,050	**$673,168**
Subtotal, Direct Service	**49,639**	**184**	**1,945**	**51,768**	**$5,329,010**	**$2,178,248**	**$1,480,641**	**$8,987,899**
Security and Resiliency	155	3	1	**159**	$22,326	$9,127	$104,017	**$135,470**
Law and Policy[73]	859	8	0	**867**	$141,103	$57,681	$295,761	**$494,545**
Agency-Level Support	1,167	19	11	**1,197**	$140,839	$97,897	$577,114	**$815,849**
Subtotal, SSA	**51,820**	**214**	**1,957**	**53,991**	**$5,633,278**	**$2,342,952**	**$2,457,534**	**$10,433,764**
ITS							$1,910,000	**$1,910,000**
DDS	12,355		400	**12,755**			$2,686,055	**$2,686,055**
Total LAE	**64,175**	**214**	**2,357**	**66,746**	**$5,633,278**	**$2,342,952**	**$7,053,589**	**$15,029,819**
OIG Transfer[74]							$25,100	**$25,100**
Total, LAE and OIG Transfer	**64,175**	**214**	**2,357**	**66,746**	**$5,633,278**	**$2,342,952**	**$7,078,689**	**$15,054,919**

[70] Includes Reimbursable workyears (157 actual FTEs in FY 2025, 270 estimated FTEs in FY 2026, and 277 estimated FTEs in FY 2027). FY 2025 includes dedicated funding for Altmeyer building renovation.

[71] Risk and Quality and Security and Resiliency were established in FY 2026. Risk and Quality provide direct, front-line service and, in FY 2025, were mainly a part of the Disability Adjudication component. Security and Resiliency were a part of the Agency-Level Support components in FY 2025.

[72] Other Objects includes field office guard services and other centralized Operations contracts.

[73] Law and Policy includes employees who perform direct service work on cases where customers appeal their benefit denial to the federal courts, in addition to agency-level support functions

[74] P.L. 119-4 allows SSA to transfer $15.1 million in FY 2025 from the LAE account to the OIG for the costs associated with jointly-operated CDI units. Similarly, P.L. 119-75 allows SSA to transfer $24.6 million in FY 2026 from the LAE account to the OIG for the costs associated with jointly-operated CDI units. The President's Budget assumes a $25.1 million transfer in FY 2027.

SENIOR EXECUTIVE SERVICE PERFORMANCE AND AWARDS

Senior Executive Service (SES) executives are eligible for special recognition, awards (including agency performance bonuses), and incentive payments to help attract, retain, recognize, reward, and motivate highly competent executives.

Performance bonuses may be awarded only to career executives and recognize performance during the previous appraisal period. To be eligible, executives must have at least a "Fully Successful" rating in the most recent performance cycle. The Commissioner approves awards following recommendations by the agency Performance Review Board.

The Social Security Administration (SSA) Performance Review Board is a peer-review body comprised of SES members who are knowledgeable of agency programs and broad performance goals. The Board makes recommendations to the Commissioner on the performance of executives, including recommendations on:

- Performance ratings;
- Performance-based pay adjustments; and
- Performance awards/bonuses.

The amount of an award must be between 5 and 20 percent of the executive's rate of basic pay as of the end of the performance appraisal period. Subject to any additional administration-imposed limitations, generally, statute limits the total award pool in an agency to 10 percent of the aggregate salaries of career appointees as of the end of the previous fiscal year.

The following charts show the percentage of the career SES for each performance level, and the total amount spent on performance awards for the SES at SSA.

Table 3.23—Senior Executive Service Performance[75,76]

SES Performance Rating	FY 2023	FY 2024	FY 2025
5—Outstanding	35%	41%	0%
4—Exceeds Fully Successful	61%	53%	56%
3—Fully Successful	4%	6%	44%
2—Minimally Satisfactory	0%	0%	0%
1—Unsatisfactory	0%	0%	0%

Table 3.24—Amount Spent on Performance Awards for the Senior Executive Service
(in millions)

	FY 2023	FY 2024	FY 2025
SES Performance Spending	$2.3	$1.6	$1.5

[75] Totals may not add to 100 due to rounding.
[76] A total of 136 SES executives received performance ratings in FY 2023, 137 in FY 2024, and 79 in FY 2025.

PERFORMANCE TARGETS

The President's FY 2027 request will allow us to achieve the following key performance targets:

Table 3.25—Key Performance Targets

Workload and Outcome Measures	FY 2025 Actual	FY 2026 Enacted	FY 2027 President's Budget	*FY 2026 to FY 2027 Change (%)*	FY 2027 Goals
Retirement and Survivor Claims					
Retirement and Survivor Claims Completed (thousands) [77]	7,284	6,702	6,838	*2%*	Increase retirement claims processing.
Disability Claims					
Initial Disability Claims Receipts (thousands)	2,105	2,208	2,356	*7%*	Drive down the initial disability claims backlog of cases and dramatically reduce customer wait time.
Initial Disability Claims Completed (thousands)	2,361	2,258	2,571	*14%*	
Initial Disability Claims Pending (thousands)	885	815	600	*-26%*	
Average Processing Time for Initial Disability Claims (days)	226	180	140	*-22%*	
Disability Reconsiderations					
Disability Reconsiderations Receipts (thousands)	648	655	675	*3%*	Drive down the disability reconsiderations backlog and dramatically reduce customer wait time.
Disability Reconsiderations Completed (thousands)	605	712	744	*4%*	
Disability Reconsiderations Pending (thousands)	370	309	240	*-22%*	
Average Processing Time for Disability Reconsiderations (days)	241	230	170	*-26%*	
Hearings					
Hearings Receipts (thousands)	414	495	508	*3%*	Increase hearings dispositions as customers file more hearings requests. Reduce average processing time to historic lows.
Hearings Completed (thousands)	395	425	534	*26%*	
Hearings Pending (thousands)	281	349	323	*-7%*	
Annual Average Processing Time for Hearings Decisions (days)	284	270	240	*-11%*	
National 800 Number					
National 800 Number Calls Handled (millions) [78]	68	68	75	*10%*	Serve 75 million customers on our National 800
Average Speed of Answer (ASA) (minutes)	15	6	3	*-50%*	

[77] Includes Medicare.

[78] National 800 Number Customers Served represents total customers served by an agent and Interactive Voice Response (IVR), including Question and Answer (QnA) bots. Actuals for FY 2025 (35 million automated calls), include data for October 2024 through April 2025 which counts the total number of IVR responses rather than individual calls, which could include multiple transactions for a single call. As of May 2025, we refined the definition to count unique automated calls as only one call, even if multiple transactions are completed, which eliminates the potential for double-counting. We project 37 million automated calls handled in FY 2026 and 39 million in FY 2027.

Limitation on Administrative Expenses

Workload and Outcome Measures	FY 2025 Actual	FY 2026 Enacted	FY 2027 President's Budget	*FY 2026 to FY 2027 Change (%)*	FY 2027 Goals
National 800 Number Service Level % < 10 minutes	14%	33%	75%	*127%*	Number. Agents will answer the phone in 3 minutes or less on average for customers who choose to speak to an agent.
Agent Busy Rate (percent)	5.9%	3%	3%	*0%*	
Program Integrity					
Periodic Continuing Disability Reviews (CDR) Completed (thousands)	1,355	1,400	1,400	*0%*	Prioritize our PI to achieve CDR currency by FY 2028 or sooner.
Full Medical CDRs (included above, thousands)	401	600	600	*0%*	
SSI Non-Medical Redeterminations Completed (thousands)	2,484	2,600	2,900	*12%*	
Selected Other Agency Workload Measures					
Social Security Numbers (SSN) Assignment Completed (millions)	17	17	17	*0%*	Modernize core services, enumerating customers and posting timely accurate earnings to ensure strong stewardship.
Annual Earnings Items Completed (millions)	295	300	300	*0%*	
Social Security Statements Issued (millions) [79]	10	15	15	*0%*	
Selected Production Workload Measures					
Disability Determination Services Production per Workyear [80]	276	312	332	*6%*	Achieve significant increases in productivity on our most expensive workloads.
Hearings Operations Production per Workyear	83	100	121	*21%*	

Our budget is fully integrated with our Annual Performance Report (APR), which is included as the last tab in this *Justification of Estimates for Appropriations Committees*, and online at our website. The budget estimates are linked to the key performance measures above and support all of the more detailed measures outlined in the APR.

[79] The Social Security Statements Issued measure includes paper statements only and does not include electronic statements issued. In FY 2025, nearly 50 million customers accessed their Social Security Statement online. In FYs 2026 and 2027, we will send paper statements to people aged 60 and older who are not receiving Social Security benefits and who are not registered for a *my* Social Security account, at a cost of approximately $12 million each year.

[80] DDS Production Per Workyear (PPWY) includes cases completed via Federal assistance.

PROGRAM INTEGRITY

The FY 2027 President's Budget demonstrates our commitment to ensure only eligible individuals receive the benefits to which they are entitled, and to safeguard the integrity of our benefit programs.

The Consolidated Appropriations Act, 2026 (P.L. 119-75) provided $2.397 billion in dedicated funding for program integrity (PI) activities in FY 2026. The FY 2027 Budget also includes $2.397 billion in dedicated funding for PI activities, including a $2.124 billion adjustment.

We utilize dedicated PI funding to ensure responsible spending of taxpayer funds and to make certain that we are providing the correct benefit amounts only to those who qualify. The funding pays for continuing disability reviews (CDRs) and related appeals to confirm that only qualified individuals receive disability payments. The funding also pays for non-medical redeterminations (RZs) to determine whether recipients receiving Supplemental Security Income (SSI) continue to meet the program's income and resource limits. PI funding also supports Cooperative Disability Investigation (CDI) units, which investigate cases of suspected disability fraud in order to stop payment before it occurs, and the prosecution of beneficiary-side program fraud and identity theft by Special Assistant United States Attorneys (SAUSAs).

From the adjustment funding, we make an annual transfer to the Office of Inspector General (OIG) for costs associated with jointly-operated CDI Unit costs. For FY 2026, we assume $24.6 million will be transferred to OIG, and the President's Budget supports a $25.1 million transfer in FY 2027.

Dedicated PI funds are a subset of our total Limitation on Administrative Expenses (LAE) funding and are available for 18 months from the start of the fiscal year in which it is appropriated. The Budget assumes 18-month availability for PI funding which is exclusively for dedicated PI activities.

The PI funding also supports the expansion of SAUSAs to 50 offices, consistent with the White House memorandum, *Preventing Illegal Aliens from Obtaining Social Security Act Benefits*. With this funding, we conducted a major hiring initiative in FY 2025, resulting in the recruitment and selection of over 25 SAUSAs. Onboarding of the SAUSAs will take place in FY 2026.

Our FY 2027 discretionary request assumes continued funding of these activities in the outyears, which would produce significant savings.

CDRs conducted in FY 2027 will yield an estimated return on investment (ROI) of about $9 on average in net Federal program savings over 10 years per $1 budgeted for dedicated program integrity funding, including Old-Age, Survivors, and Disability Insurance, SSI, Medicare, and Medicaid program effects. Similarly, the ROI for non-medical redeterminations conducted in FY 2027 will be about $4 on average of net Federal program savings over 10 years per $1 budgeted for dedicated PI funding, including SSI and Medicaid program effects.

Limitation on Administrative Expenses

Completing medical CDRs timely is critical to good stewardship. The President's Budget assumes we will eliminate the CDR backlog no later than FY 2028 and be current on all full medical CDR diaries in outyears and remain current throughout the Budget window.

In FY 2025, we completed 401,198 full medical CDRs and 2,483,577 RZs. We plan to complete 600,000 full medical CDRs in FY 2026 and FY 2027, putting us on track to achieve currency by the end of FY 2028 or sooner. We also plan to complete 2.6 million RZs in FY 2026 and 2.9 million RZs in FY 2027.

Table 3.26—Program Integrity Volumes and Funding by Source[81]
(Dollars in millions)

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Estimate
Volumes			
Full Medical CDRs Completed	401,198	600,000	600,000
SSI Non-Medical RZs Completed	2,483,577	2,600,000	2,900,000
Funding[82,83]			
Unobligated Balance, start-of-year	$82	$112	$112
Dedicated Program Integrity Funding	$1,903	$2,397	$2,397
Subtotal PI Resources	**$1,985**	**$2,509**	**$2,509**
Less Unobligated Balance, end-of-year	-$112	-$112	-$112
Total PI Obligations[84]	**$1,873**	**$2,397**	**$2,397**
Old Age and Survivors Insurance (OASI)	$89	-	-
Disability Insurance (DI)	$288	$672	$701
Supplemental Security Income (SSI)	$1,304	$1,725	$1,696
Medicare Part A, Hospital Insurance (HI)	$77	-	-
Medicare Part B, Supplementary Medical Insurance (SMI)	$101	-	-
Medicare Part D, Drug Coverage	$14	-	-
Total PI Obligations[85]	**$1,873**	**$2,397**	**$2,397**

[81] Totals may not add due to rounding.
[82] Dedicated program integrity funds have 18-month availability. The Budget assumes funding to complete planned program integrity workloads in FY 2027, including through base funding and an adjustment.
[83] Includes a $15,100,000 transfer in FY 2025, a $24,600,000 transfer in FY 2026, and a $25,100,000 transfer in FY 2027 from LAE to the SSA's Inspector General (OIG) for the cost of jointly operated anti-fraud CDI units.
[84] Totals include the combined costs of CDRs (Full Medical, Work, and due process appeals), SSI RZs, CDI units, and the SAUSAs.
[85] We do not project program integrity costs for OASI, HI, SMI, or Medicare Part D, but do report this information with the actuals.

Budgeting and Managing Program Integrity

While we take many steps to ensure we analyze and budget for the costs of our CDRs and SSI RZs, we do not know actual costs until after the end of the fiscal year. The 18-month authority allows us the flexibility to obligate our dedicated program integrity funding responsibly. The individual unit costs and the volume of work processed for CDRs and RZs are the primary drivers that determine the actual total program integrity costs. Fluctuations in our PI unit costs occur throughout the year due to a variety of factors, such as:

- hiring and training, which can impact productivity in the work units where PI work is done;
- information technology investments;
- policy changes;
- business process changes;
- timing of work completion (e.g. work can start in a prior fiscal year and clear in the next); and
- the types of cases processed in a year (e.g. processing a greater number of more time-consuming types of CDRs in a year can increase unit costs in that year).

In addition to these variables, PI work occurs across the country in every field office, processing center, and State DDS, and some PI work must be done on-demand when we become aware of an issue with a claimant's situation. For these reasons, it is difficult to predict final processing levels in advance, so we make a conservative estimate of total expected costs at the end of the year to stay within the total available program integrity funding.

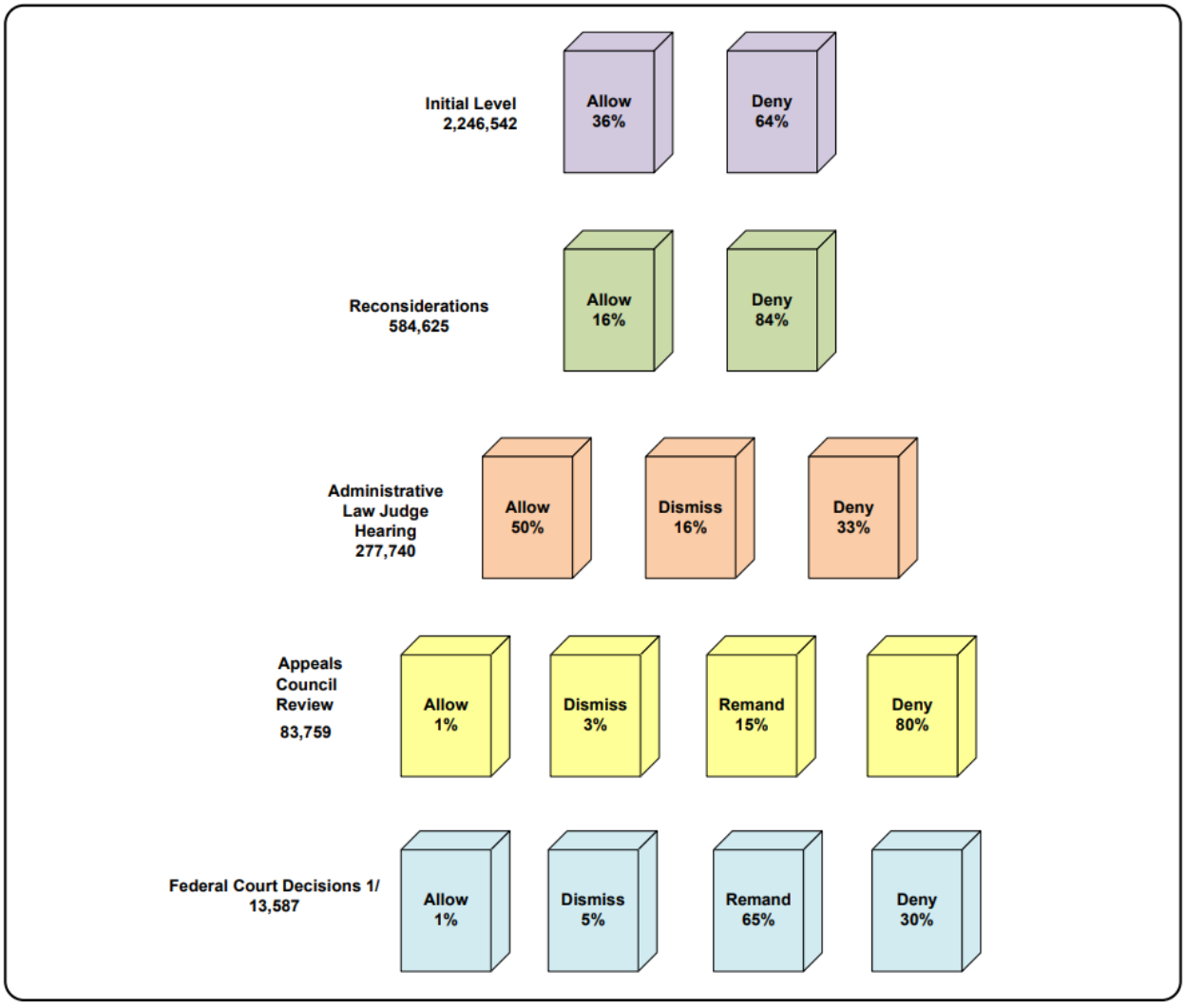
We calculate the unit costs for PI workloads using data from our Cost Analysis System. This system allocates our administrative costs to all workloads, including CDRs and RZs. Changes in other agency workloads, as well as in other large agency cost categories such as information technology (IT), can impact the overall total unit costs for PI workloads, which we factor into our end-of-year cost estimates for CDRs and RZs throughout the year.

Our PI unit costs include direct payroll, direct other objects, information technology systems (ITS), and agency shared costs that include both payroll and other objects. Our direct payroll includes costs of our employees in the front-line processing units like our field offices, processing centers, and State DDSs. ITS costs include all non-payroll costs associated with our IT investments. Direct other objects costs include the non-payroll, non-ITS costs of our front-line processing units. Lastly, agency shared costs include all other costs, like headquarters organizations as well as a portion of rent, postage, and guards.

We closely monitor and adjust our processing plans for PI workloads based on our real experience, while striving to hit all performance and spending targets. We also regularly monitor the effects of the cost factors described above to pace this work throughout the fiscal year and to inform our spending decisions.

FISCAL YEAR 2025 DISABILITY DECISION DATA

Table 3.27—Fiscal Year 2025 Disability Decision Data*



*Workload volumes for initial claims, reconsiderations, and hearings do not align with performance reported in our key performance measures table because the data definition for the key performance measures table captures broader activity.

1/ Only Federal Court data includes appeals of Continuing Disability Reviews (CDRs).

Data Sources:

1. Initial and Reconsideration Data: SSA State Agency Operations Report
2. Administrative Law Judge and Appeals Council data: SSA Disability Adjudication (DA)
3. Federal Court data: SSA Law and Policy (LP)

Includes Title II, Title XVI, and concurrent initial disability determinations and appeals decisions issued in FY 2025, regardless of the year in which the initial claim was filed, and regardless of whether the claimant ever received benefits (in a small number of cases with a favorable disability decision, benefits are subsequently denied because the claimant does not meet other eligibility requirements). Does not include claims where an eligibility determination was reached without a determination of disability. If a determination or appeals decision was made on Title II and Title XVI claims for the same person, the results are treated as one concurrent decision.

NOTE: Due to rounding, data may not always total 100 percent.
Prepared by: SSA, Decision Support and Strategic Information (DSSI)
Date Prepared: January 8, 2026

Introduction

Our agency is committed to transforming service delivery through a digital-first approach that puts the needs of the American public at the forefront. Leveraging advancements in technology, we are modernizing our operations to improve efficiency and accessibility for all.

We are focused on providing meaningful, efficient, and responsive interactions across all service channels. By streamlining processes and investing in innovative technologies, we are building a foundation for high-quality, reliable service that benefits both our customers and employees.

In fiscal years (FY) 2026 and 2027, our priorities include delivering a modern customer experience, reducing wait times across all service channels, improving employee support tools, and strengthening our technology infrastructures.

Table 3.28—Total Information Technology Systems (ITS) Obligations

(Dollars in Millions)[86]	TAFS Code[87]	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
Current Year ITS	28258704	$1,157	$1,790	$1,710
Prior Year Transfer/Carryover	028X8704	$200	$200	$200
IT Reimbursables	28258704	$12	$10	$18
Subtotal ITS		**$1,369**	**$2,000**	**$1,928**
Internal Labor (Payroll)	28258704	$609	$582	$625
Total		**$1,978**	**$2,582**	**$2,554**[88]

A Customer-Focused Vision for Mission Delivery

Our modernization efforts focus on providing convenient, accessible, and responsive service to the American public across all channels — digital, phone, and in-person. Our strategic priorities are:

- **Delivering a digital-first customer experience**
- **Reducing wait times across all service channels**
- **Improving employee support tools**
- **Strengthening core technologies and processes**

[86] Totals may not add due to rounding.
[87] The Treasury Appropriation Fund Symbol (TAFS) combines the Treasury agency or department code, the Federal account symbol, and the period of availability of the resources in the account.
[88] The FY 2027 IT total included in this exhibit reflects the most current estimate and may not align with the corresponding total reported in the Analytical Perspectives section of the President's Budget due to differences in timing and scope.

Below are the FY 2026 and 2027 projects and investments that will enable us to execute and achieve these goals.

Delivering a Modern, Digital-First Customer Experience

We are expanding and enhancing our online and mobile services to meet public expectations for efficient, user-friendly experiences. This includes not only enhancing our existing digital products but also developing new solutions to better serve our customers.

Initiative	Description and Outcomes	FY 2027 cost in millions
my Social Security Modernization and Mobile App	Modernize *my* Social Security to make it more accessible with expanded self-service options, enhanced mobile experience, and real-time customer communication. *Outcomes: Increase self-service options and digital communication methods that reduce the need for customers to make phone calls or visit a field office.*	$15.5
Enterprise Document Management Product	Establish an enterprise document management system that collects and shares documents across SSA systems, consolidating existing solutions into one platform. *Outcomes: Enable customers to upload more document types online and simplify integration with downstream systems for faster and more accurate services.*	$27.4
Social Security Number (SSN) Card Services Modernization	Streamlined online enumeration processes that includes a digital solution to let customers view their SSN on mobile and reduce the volume of replacement requests. *Outcomes: Allow customers on-demand access to their SSN to reduce phone and field office traffic and increase cost efficiency.*	$19.4
Notices and All Customer Communications on *my* Social Security	All written communication and notices generated by the agency should be accessible online through *my* Social Security. Regulations and policies should support electronic delivery and only rely on paper when necessary. *Outcomes: Expand types of agency communications online and facilitate opt-in for digital communications to reduce reliance on paper mail and provide information to our customers faster.*	$17.5

Reducing Wait Times Across All Service Channels

We encourage use of our online and mobile channels, but recognize some customers prefer phone or in-person support. Strengthening all service channels to address needs effectively on the first contact is our goal to minimize wait times and improve overall service quality.

Initiative	Description and Outcomes	FY 2027 cost in millions
Enterprise Contact Center/ Interactive Voice Response	The agency's cloud-based contact center solution provides a modernized telephone experience that facilitates self-service and agent-based support supplemented by Artificial Intelligence (AI). *Outcomes: Increase call routing to automated systems and integrate claim status and appointment scheduling into self-service functionality. Reduce wait times and ensure that phone*	$127.0

Initiative	Description and Outcomes	FY 2027 cost in millions
	customers receive timely access to the information and support services they need.	
National Appointment Scheduling Calendar	The National Appointment Scheduling Calendar will simplify and consolidate telephone appointment scheduling for initial claims nationwide. Balance demand for appointments against staff capacity nationwide and let customers schedule timely appointments regardless of their physical location. *Outcomes: Add new appointment types and increase the number of customers who can self-schedule appointments to reduce phone calls and shorten wait times at field offices.*	$13.5
Enterprise Customer Relationship Management (CRM) System	Our CRM system will provide our technicians with a 360-degree view of customer data and closely integrate with service delivery applications. Frontline staff interact with dozens of systems to accomplish tasks and access policy and procedure guidance. Data sharing between systems is inefficient. *Outcomes: Integrate with additional solutions including Technician Experience Dashboard, Enterprise Contact Center, Workload Management, and Claims Status to provide holistic customer support.*	$46.8
National Workload Management	Centralizes cases and tasks, allowing work to be distributed nationally based on staff skills and availability. This improves service hours and balances workloads across SSA. Lack of a centralized system to consolidate and manage workloads across SSA lines of business limits visibility into customer needs and restricts efficient work distribution. *Outcomes: Provide the ability for national SSA Staff to service initial claims phone appointments regardless of jurisdiction and integrate with enterprise dashboards.*	$17.1

Improving Employee Support Tools

Technology enables our employees to deliver efficient service. We are investing in advanced solutions, including AI technologies, to enhance workforce productivity and performance. These tools help reduce manual tasks, provide valuable insights, and highlight key information for our technicians.

Initiative	Description and Outcomes	FY 2027 cost in millions
Medical Summary (Intelligent Medical Language Analysis Generation or IMAGEN)	Building an ability to support adjudicators with AI that reads and summarizes the facts and evidence of a case to identify the most important details and link to the pertinent Medical Evidence of Record (MER) to expedite adjudication. *Outcomes: Increase the types of medical information that can be summarized by IMAGEN and increase adoption to drive faster determinations.*	$2.2
Streamline Hearing Scheduling Product	A seamless, comprehensive solution integrated with the National Case Processing System that provides availability for representatives and administrative law judges and facilitates	$11.7

Initiative	Description and Outcomes	FY 2027 cost in millions
	hearing scheduling. *Outcomes: Reduce manual components of hearing scheduling to save technicians time and schedule hearings more quickly for our customers.*	
Technology Assisted Adjudication for Simple Retirement and Medicare	This tool helps process simple Retirement Insurance Benefit and Medicare claims to improve technician efficiency. For more complex claims, it highlights specific issues for technicians to review to deliver benefits faster. *Outcomes: Reduce the growing backlog of Retirement and Medicare claims and speed up the delivery of benefits.*	$3.4
Improved Exhibiting and Prep Work	Updates to several adjudication processing systems to increase the efficiency of prep work by reviewing and exhibiting evidence and eliminating duplicates. Adjudication preparation is often a manual, repetitive, and cumbersome process. *Outcomes: Improve processes required to review case documentation and perform deduplication functions.*	$0.4

Strengthening Core Technologies and Processes

We are modernizing our technology infrastructure to improve reliability, security, and cost effectiveness. By updating our information architecture and expanding AI integrations, we aim to simplify system maintenance and support efficient, customer-focused solutions for technicians.

Initiative	Description and Outcomes	FY 2027 cost in millions
Processing Center (PC) Improvement	Refine and expand existing processes to reduce the number of work items that require manual review and end up in PC backlogs. Process exceptions restrict case processing efficiency. These cases are sent to PCs for manual handling. *Outcomes: Address the root causes of fallouts to prevent cases from going to the PCs, reduce back logged case volume, and speed up claims processing for the public*.	$6.3
Increase IMAGEN Adoption and Expansion	Increase IMAGEN adoption and expansion to accelerate the realization of benefit of investment in IMAGEN. Capabilities will increase usability, adoption, and efficiency and allow quicker adjudication and high priority user enhancements. *Outcomes: Introduce integrations with other systems and improve user interface quality and features to drive system adoption.*	$2.5
National Case Processing System (NCPS)	Consolidates case processing systems for robust management information across all levels of disability adjudication with improved case processing efficiency. Disparate legacy case processing applications perpetuate technical debt and inefficiencies, and manual processes are slow and error prone. *Outcomes: Optimize workload allocation to decrease task time and improve processing time at the appeals level to drive case closure.*	$9.8
Health Information Technology (HIT)	SSA uses HIT interoperability networks to enhance interactions with electronic medical records, maximize our opportunities to	$11.2

Initiative	Description and Outcomes	FY 2027 cost in millions
	reduce paper processes, and facilitate electronic payments for MER through a standardized Federal payment process. *Outcomes: Reduce the time and costs associated with obtaining medical evidence by increasing the number of providers we exchange with and develop data format standards that ensure data can be ingested without manual review.*	
Enhanced Medical Acquisition and Processing	Updates to NCPS features used by our State disability determination services to enhance and centralize forms and medical evidence requests and expand case processing functions. *Outcomes: Obtain medical evidence earlier in the disability adjudication process and use AI to support identification of determination ready claims once evidence is in file, reduce evidence acquisition costs, and speed up case processing times.*	$2.9
Consolidated Claims Experience (CCE)	CCE uses a holistic, integrated approach to assist employees in processing initial Title II/Title XVIII claims. *Outcomes: Intuitive pathing will provide technicians with a single-entry point to determine eligibility, initial claims intake and processing, and maintaining post-entitlement/post-eligibility activities in one experience.*	$63.3
Work Continuing Disability Review (CDR) Product	This product lets technicians intake work reports, process paystubs, complete work reviews, send notices/forms, and manage workloads to verify customers' disability benefit eligibility. *Outcomes: Migrate to a modernized Work CDR application, ingrate with downstream systems, and enhance management information reporting.*	$8.8

Migrating the code base to modern programming languages where appropriate

In engineering, we chose the right tool for the job. COBOL delivers where it counts with solutions that have been battle-tested for decades, reliably processing more than a trillion dollars in payments annually with unmatched stability and uptime. COBOL excels at fixed-point arithmetic, critical for accurate handling of monetary values without rounding errors—something languages like Java can struggle with unless carefully managed. Additionally, risk of a large "porting" effort to another language would introduce enormous destabilization risks and would require running new and old systems in parallel to validate success for a long period of time (think about annual cyclical events). We are not stuck in the past, we continue to inject modern systems (e.g., cloud-native apps, Application Programming Interfaces) for new features and use COBOL where it is best suited while modernizing underlying database and infrastructure to minimize operational and development cost.

Investing in Artificial Intelligence to Assist our Workforce

We are prioritizing innovative data and AI-driven solutions to augment SSA's service delivery, operational efficiency, and customer experience. Investments in centralized, customer-focused data products and modern technologies are streamlining data collection, access, and sharing, ensuring timely, accurate information for our customers and faster delivery of new solutions.

In FY 2026 and 2027, we are expanding responsible and effective AI adoption across the agency through key initiatives that align with Administration priorities to support government modernization, increased efficiency, and improved public access to digital services.

- **Generative Technology Decision Content Generation:** By using AI to support the creation of written decision rationales for disability claims, this initiative addresses claim backlogs and staff attrition, ensuring policy-compliant, evidence-cited decisions.
- **Policy Analysis Tool (PAT):** This chatbot enables staff to efficiently retrieve and synthesize complex regulatory and policy information, improving workforce productivity and decision-making.
- **Vocational Analysis and Assessment Tool (VAAT):** VAAT speeds up key steps in the disability examination process, streamlining job matching and vocational assessments to accelerate claim processing and improve accuracy.
- **Document and Form Processing:** By using AI to support the processing of millions of forms and documents annually, we are increasing operational efficiency, reducing costs, and freeing staff for higher-value work.
- **Disability Claim Intake:** We are leveraging conversational agents and intelligent workflow pathing to streamline the disability claim intake process, reducing claimant burden and minimizing errors.
- **Legacy Disability Model Modernization:** This initiative centralizes and modernizes existing legacy models for disability decision support, focusing on improving model performance, program integrity, and anti-fraud capabilities through advanced machine learning.

SSA's targeted technology initiatives are modernizing operations, improving service quality and speed, and maximizing Federal resources. This approach helps us stay responsive to evolving customer needs, reduce administrative burdens, and deliver better outcomes for the public.

IT Infrastructure, IT Security, and IT Management

We are committed to enhancing our operations by investing in IT infrastructure, cybersecurity, and IT management to help us transition to an online organization that fulfills our mission to deliver millions of customer interactions every year.

IT Infrastructure

Our infrastructure initiatives provide the foundation for building and operating our IT with best-in-class uptime and support continuity of service and systems growth. We will invest in critical refreshments delayed from previous years and modernization initiatives to build secure, available, multi-channel services our public demands. Key infrastructure initiatives include:

- **IT Operations Management (ITOM) Improvements:** We are replacing our ITOM technologies and practices in a multi-year effort to improve how we manage our IT capabilities in a hybrid cloud ecosystem.
- **Mainframe Business Resilience:** Improvements to our business resilience processes will allow us to move workloads between data centers as business or environmental circumstances demand. Our target is to enable 99.99 percent uptime to better support a 24/7 system availability to align with our focus on providing online and mobile apps for customer self-service.
- **Moving to Internet Protocol Version 6 (IPv6):** We are transitioning communications to IPv6 in accordance with the Office of Management and Budget (OMB) memorandum M-21-07, *Completing the Transition to Internet Protocol Version 6,* and Executive Order 14208, *Improving the Nation's Cybersecurity*.
- **Application Development Infrastructure:** Funding will support enterprise-wide analysis, design, development, coding, testing, and release services for application development that integrates user-centered development, testing, and standards, ensuring that applications comply with Section 508 and Enterprise Architecture standards.

IT Security

Protecting our networks and program information is essential to our mission because SSA collects personally identifiable information for more than 330 million Americans. The agency is actively implementing cybersecurity measures in accordance with Executive Order 14208, *Improving the Nation's Cybersecurity*, to safeguard sensitive data and uphold public trust. Key initiatives include:

- **Cybersecurity Modernization and Compliance:** Modernize, automate, and integrate cybersecurity tools and processes to meet Federal mandates in alignment with Federal Information Security Modernization Act, Homeland Security Presidential Directive-12, Federal Identity, Credential, and Access Management, and OMB requirements; streamline authorization and enhance continuous monitoring, leveraging AI where applicable.
- **Identity, Access, and Risk Management:** Expand identity and access management, risk quantification, and insider threat programs.
- **Security Operations and Threat Response:** Invest in security operations, monitoring, and analytics for the agency's external attack surface; establish comprehensive threat detection, response, and mitigation capabilities.
- **Assessment and Application Security:** Modernize State agency assessment processes using reciprocity when available; emphasize dynamic application scanning early in the development lifecycle.

- **Workforce and Secure Practices:** Support workforce development and security awareness initiatives; promote secure development and deployment practices for emerging technologies.

IT Management

The IT management investment captures all costs associated with IT management and strategic planning (including Chief Information Officer (CIO) and other senior leadership full-time equivalent costs), enterprise architecture, capital planning, IT budget and finance, IT vendor management, general IT policy and reporting, and IT governance. Key initiatives include:

- **Federal Information Technology Acquisition Reform Act (FITARA) Practices:** Establish and execute processes in direct support of CIO authority enhancements per FITARA, employing sound risk management processes in alignment with the agency's enterprise risk management principles, including identifying, measuring, monitoring, and controlling risks; transparent decision-making; effective communication; and prioritization of risk.

The table below is the Agency Information Technology Portfolio Summary (AITPS), which includes budget estimates for overall IT investments and for major and significant IT systems. Costs for major initiatives in the narrative above are included in this table.

Table 3.29—FY 2027 Agency IT Portfolio Summary
(Costs in Millions)

	Total Cost[89]		
	2025	**2026**	**2027**
IT Portfolio Total	**$1,978.2**	**$2,581.9**	**$2,553.5[90]**
Mission Delivery	**$462.0**	**$738.8**	**$811.6**
Priority Product Development	**$215.8**	**$317.7**	**$367.4**
Tech Priorities	**$129.8**	**$287.9**	**$250.0**
Other Product Development	**$116.4**	**$133.2**	**$194.2**
Mission Support	**$293.5**	**$292.6**	**$286.9**
Production Support & Maintenance	**$195.4**	**$184.2**	**$176.7**
Enterprise Services	**$88.7**	**$102.2**	**$103.6**
Compliance, Mandates, & Regulatory	**$9.3**	**$6.1**	**$6.6**
IT Infrastructure, IT Security, and IT Management	**$1,222.7**	**$1,550.5**	**$1,455.0**
Cybersecurity	**$195.9**	**$306.3**	**$304.8**
Infrastructure	**$886.2**	**$1,145.2**	**$1,054.5**
Application	$38.5	$52.6	$53.0
Data Center and Cloud	$396.2	$384.0	$357.7
End User	$144.1	$266.5	$207.5
Network	$246.6	$306.0	$306.0
Output	$6.4	$7.1	$6.1
Platform	$7.0	$4.2	$3.8
Digital Identity Transactions	$47.4	$124.8	$120.0
IT Governance & Other Support	**$140.6**	**$98.9**	**$95.7**

[89] Totals may not add due to rounding. Total Cost includes both ITS and internal labor expenses.
[90] The FY 2027 IT total included in this exhibit reflects the most current estimate and may not align with the corresponding total reported in the Analytical Perspectives section of the President's Budget due to differences in timing and scope.

Table 3.30—FY 2027 Cybersecurity Summary
(Cost in Millions)

National Institute of Standards and Technology (NIST) Function	FY 2025	FY 2026	FY 2027
Detect	62.3	76.2	70.0
Govern	35.5	45.9	42.2
Identify	12.2	18.1	16.6
Protect	123.7	190.3	176.1
Recover	3.5	1.4	1.3
Respond	15.1	26.1	24.1
Total[91]	**$252.2**	**$358.0**	**$330.2**

[91] Totals may not add due to rounding.

INFRASTRUCTURE COSTS & MAJOR BUILDING RENOVATIONS: PLANS AND PROJECTIONS

The ongoing modernization of our agency's information technology (IT) infrastructure is enabling us reach customers without requiring a to visit the field office. Many SSA services are now accessible online or by phone, eliminating the need for in-person visits and enhancing customer convenience. We are committed to meeting customers where they request service—whether online, by phone, or in person—ensuring flexible and accessible service delivery. We are redesigning our public-facing offices with operational efficiency as a core principle; our field offices will remain open. Space configurations are being optimized based on customer service patterns and workload distribution, minimizing underutilized areas and maximizing multi-use spaces. For example, dedicated conference and interactive video training rooms are being consolidated into shared spaces, as most training is now conducted virtually.

These initiatives support the requirements of the Utilizing Space Efficiently and Improving Technologies Act ("USE IT Act"), as outlined in Section 2302 of the Thomas R. Carper Water Resources Development Act of 2024 (PL S. 4376), and align with our agency's evolving service delivery model. For non-public facing spaces, we are collaborating with our internal components to define space requirements, identify specialized critical areas (such as data communication rooms), and pursue opportunities to reduce space and expenses where feasible. We are actively seeking opportunities at our non-public facing sites to optimize space utilization and achieve cost savings where it aligns with business needs.

As we manage our real property portfolio, we remain committed to leveraging our resources to provide the highest level of public service in the most cost-effective manner.

This exhibit outlines our major building costs for fiscal year (FY) 2025 and provides an update on ongoing major building renovations and repairs funded in previous years.

FY 2025 Accomplishments

In FY 2025, we realized substantial space and rent savings through several key initiatives. Most notably, by vacating our large lease in Falls Church, Virginia upon its expiration, we achieved approximately $10 million in annual savings and reduced our footprint by over 250,000 usable square feet (USF). Staff previously located in Falls Church were relocated to an existing lease in Washington, DC, which comprises 32,000 USF. After careful evaluation, we determined that pursuing prospectus-level replacement space for Falls Church was not warranted, as our current space requirements do not justify a long-term strategic leased asset.

For a detailed breakdown of FY 2025 infrastructure actual costs by component and region, please refer to Table 3.31 and Table 3.32 below.

Table 3.31—FY 2025 Physical Infrastructure Costs by Component

(Dollars in thousands)[92]

Components[93]	Rental Payments to GSA	Communications, Utilities & Misc. Charges	Operations & Maintenance of Facilities[94]	Operations & Maintenance of Equipment	Total
LAE One Year					
Office of Operations	$535,733	$31,199	$334,877	$4	$901,813
Office of Disability Adjudication	$100,667	$2,180	$48,213	$0	$151,060
Office of Human Resources	$0	$4	$0	$0	$4
Office of Law & Policy	$765	$17	$93	$0	$875
Office of Communications	$0	$0	$2	$0	$2
Office of Civil Rights and Equal Opportunity	$0	$2	$2	$0	$4
Office of Budget, Finance, & Management	$0	$256	$0	$0	$256
DCBFM - Agency Level	$57,122	$217,585	$61,218	$115	$336,039
LAE PI CA	$(279,202)	$0	$0	$0	$(279,202)
Disability Determination Services	$0	$44,906	$0	$0	$44,906
Information Technology Systems	$0	$153,053	$0	$519,214	$672,266
Social Security Advisory Board	$260	$5	$50	$8	$323
Subtotal LAE One Year	**$415,345**	**$449,207**	**$444,454**	**$519,341**	**$1,828,347**
LAE No Year					
Delegated Buildings	$0	$19,200	$64,098	$4	$83,302
Information Technology Systems	$0	$0	$0	$120,005	$120,005
Low Income Subsidy	$0	$0	$0	$0	$0
Technology Modernization Fund	$0	$0	$0	$9,485	$9,485
Postal Service Reform Act	$0	$0	$0	$83	$83
eCBSV	$0	$0	$0	$14,231	$14,231
Subtotal LAE No Year	**$0**	**$19,200**	**$64,098**	**$143,808**	**$227,106**
LAE Multi Year					
Program Integrity	$284,422	$0	$0	$185,762	$470,185
Subtotal LAE Multi Year	**$284,422**	**$0**	**$0**	**$185,762**	**$470,185**
Grand Total	**$699,767**	**$468,407**	**$508,552**	**$848,911**	**$2,525,637**

[92] Totals may not add due to rounding.

[93] FY 2025 actuals are only available under our previous agency structure. As a result, the components listed do not reflect our latest reorganization initiated in FY 2025 and implemented in FY 2026. For more information about our organizational structure, please visit our website at https://www.ssa.gov/org/.

[94] Includes guard services.

Table 3.32—FY 2025 Physical Infrastructure Costs by Region
(Dollars in thousands)[95]

Regions	Rental Payments to GSA	Communications, Utilities & Misc. Charges	Operations & Maintenance of Facilities[96]	Operations & Maintenance of Equipment	Total
Boston	$30,250	$1,568	$1,946	$0	$33,765
New York	$82,334	$5,164	$21,745	$2	$109,245
Philadelphia	$57,503	$4,513	$15,032	$0	$77,049
Atlanta	$132,618	$7,610	$5,670	$0	$145,899
Chicago	$89,707	$6,102	$9,228	$2	$105,039
Dallas	$65,312	$3,312	$1,664	$1	$70,288
Kansas City	$29,427	$1,986	$4,350	$0	$35,763
Denver	$16,117	$982	$1,393	$0	$18,492
San Francisco	$110,939	$4,663	$2,996	$0	$118,598
Seattle	$22,378	$1,111	$601	$0	$24,090
Headquarters[97]	$63,181	$431,396	$443,927	$848,906	$1,787,411
Total	**$699,767**	**$468,407**	**$508,552**	**$848,911**	**$2,525,637**

Building on our FY 2025 USF reduction of more than 270,000, we plan to further reduce our footprint in FYs 2026 and 2027, achieving projected savings of over 100,000 USF in each of these years, respectively.[98]

Space Reduction Efforts

In FYs 2026 and 2027, we will implement strategic adjustments across our four direct service areas, in coordination with the General Services Administration (GSA), with a primary focus on reducing underutilized non-public facing office space.

Northeast Direct Service Area

- We are actively exploring opportunities to consolidate space in Philadelphia, Pennsylvania.
- We are planning additional non-public facing space reductions and consolidations in Boston, Massachusetts and New York, New York.

[95] Totals may not add due to rounding.

[96] Includes guard services.

[97] Includes DDS, SSAB, ITS, Delegated Buildings, Program Integrity, and Low-Income Subsidy.

[98] We are unable to project costs by component and region for FYs 2026 and 2027 due to recent organizational restructuring. Please refer to Table 3.31 for the FY 2025 Physical Infrastructure Costs by Component and Table 3.32—FY 2025 Physical Infrastructure Costs by Region for FY 2025 actuals under our prior structure.

Southeast Direct Service Area

- We are pursuing further non-public facing space reductions and consolidations in Atlanta, Georgia.

Mid-West/West Direct Service Area

- We are exploring non-public facing space reductions and consolidations in Kansas City, Missouri, and moving forward with consolidation activities in Denver, Colorado.

- We are also evaluating opportunities for space optimization at our Headquarters in Woodlawn, Maryland, and surrounding outlying buildings.

Southwest Direct Service Area

- We plan to vacate the Frank Hagel Federal Building in Richmond, California (CA), where we currently occupy 388,000 USF and incur annual rent costs of approximately $4.5 million. Staff will be redirected to the Ronald V. Dellums Federal Building in Oakland, CA, where we will expand our existing presence to accommodate additional employees.