

# SOCIAL SECURITY ADMINISTRATION

## FY 2018 PRESIDENT'S BUDGET

### Key Tables

Table i.1 - Summary Table of SSA's Appropriation Request

FY 2018	FTE	Amount
Payments to Social Security Trust Funds		\$ 11,400,000
Supplemental Security Income (SSI) Program	--	--
FY 2018 Request	--	\$ 38,557,000,000 <sup>1</sup>
FY 2019 First Quarter Advance	--	\$ 19,500,000,000
Limitation on Administrative Expenses (LAE)	61,265 <sup>2</sup>	\$ 12,457,000,000 <sup>3</sup>
Office of the Inspector General	517	\$ 105,500,000

<sup>1</sup> Excludes \$15,000,000,000, previously appropriated as a first quarter advance for FY 2018.

<sup>2</sup> Figure includes workyears for LAE and reimbursable work. Excludes workyears associated with the State Children's Health Insurance Program (SCHIP), Medicare Access and CHIP Reauthorization Act (MACRA), and Medicare Savings Plan (MSP).

<sup>3</sup> Includes \$118,000,000 for SSI State Supplementary user fees and up to \$1,000,000 for non-attorney user fees.

**Table i.2 – Administrative Budget Authority and Other Planned Obligations<sup>1</sup> (in millions)**

	<b>FY 2016 Actual</b>	<b>FY 2017 Estimate<sup>2</sup></b>	<b>FY 2018 Estimate</b>	<b>Change FY 17/FY 18</b>
<b><u>Budget Authority</u></b>				
Base Limitation on Administrative Expenses (LAE)	\$10,599	\$10,573	\$10,603	\$30
Program Integrity Base Level	\$273	\$273	\$273	\$0
Program Integrity Cap Adjustment	\$1,153	\$1,153	\$1,462	\$309
User Fees <sup>3</sup>	\$137	\$137	\$119	-\$18
<b>Subtotal, LAE Appropriation</b>	<b>\$12,162</b>	<b>\$12,135</b>	<b>\$12,457</b>	<b>\$322</b>
Percent change from FY 2017				2.65%
Research	\$101	\$101	\$101	\$0
Office of the Inspector General (OIG)	\$106	\$105	\$106	\$0
<b>Subtotal, Budget Authority</b>	<b>\$12,368</b>	<b>\$12,341</b>	<b>\$12,664</b>	<b>\$322</b>
Percent change from FY 2017				2.61%
<b><u>Other Planned Obligations</u></b>				
No-year Information Technology	\$135	\$126	\$50	-\$76
MIPPA – Low-Income Subsidy (LIS) <sup>4</sup>	\$0	\$6	\$6	\$0
MIPPA - Medicare Savings Program (MSP)	\$0	\$7	\$7	\$0
SCHIP - State Children's Health Insurance	\$0	\$1	\$1	\$0
Medicare Access and Chip Reauthorization Act of 2015 (MACRA)	\$0	\$4	\$34	\$30
Recovery Act <sup>5</sup>				
Workload Processing	\$0	\$0	\$0	\$0
Economic Recovery Payments Admin	\$0	\$0	\$0	\$0
National Computer Center Replacement	\$50	\$12	\$0	-\$12
OIG Oversight	\$0	\$0	\$0	\$0
<b>Subtotal, Other Planned Obligations</b>	<b>\$185</b>	<b>\$156</b>	<b>\$98</b>	<b>-\$58</b>
<b>TOTAL BUDGET AUTHORITY AND PLANNED OBLIGATIONS</b>	<b>\$12,553</b>	<b>\$12,498</b>	<b>\$12,762</b>	<b>\$264</b>

<sup>1</sup> Totals may not equal sums of component parts due to rounding.

<sup>2</sup> A full-year appropriation for FY 2017 was not enacted at the time the FY 2018 President's Budget was prepared. All FY 2017 figures assume funding at the annualized funding level provided in FY 2017 under P.L. 114-254 – Further Continuing Appropriations Act, 2017.

<sup>3</sup> Includes SSI user fees and Social Security Protection Act user fees.

<sup>4</sup> The Medicare Improvements for Patients and Providers Act 2008 (MIPPA) provided funding through the general fund for SSA activities related to MSP outreach and transmittal of data to states and implementation of changes to the LIS program. \$27 million in carryover funds remain available, \$12 million of which are set aside for reimbursements for the LIS workload and the remaining \$15 million for MSP costs above our annual reimbursable cap of \$3 million.

<sup>5</sup> Funds provided in the American Recovery and Reinvestment Act of 2009 (Recovery Act) (P.L. 111-5).

**Table i.3 – SSA Full Time Equivalents and Workyears**

	<b>FY 2016 Actual</b>	<b>FY 2017 Estimate<sup>1</sup></b>	<b>FY 2018 Estimate</b>	<b>Change FY 17/FY 18</b>
SSA Full Time Equivalents <sup>2</sup>	63,159	61,104	61,265	161
SSA Overtime/Lump Sum Leave	2,113	1,851	1,982	131
<b>Subtotal, SSA Workyears</b>	<b>65,272</b>	<b>62,955</b>	<b>63,247</b>	<b>292</b>
Disability Determination Services (DDS) Workyears	15,152	14,416	14,110	-306
<b>Subtotal, SSA and DDS Workyears</b>	<b>80,424</b>	<b>77,371</b>	<b>77,357</b>	<b>-14</b>
MACRA Workyears	0	21	357	336
<b>Subtotal, SSA, DDS and MACRA Workyears</b>	<b>80,424</b>	<b>77,392</b>	<b>77,714</b>	<b>322</b>
OIG Full Time Equivalents	522	517	517	0
OIG Overtime/Lump Sum Leave	4	3	3	0
<b>Subtotal, OIG Workyears</b>	<b>526</b>	<b>520</b>	<b>520</b>	<b>0</b>
<b>TOTAL SSA/DDS/OIG WORKYEARS</b>	<b>80,950</b>	<b>77,912</b>	<b>78,234</b>	<b>322</b>

<sup>1</sup> A full-year appropriation for FY 2017 was not enacted at the time the FY 2018 President’s Budget was prepared. All FY 2017 figures assume funding at the annualized funding level provided in FY 2017 under P.L. 114-254 – Continuing Appropriations Act, 2017.

<sup>2</sup> Excludes workyears associated with MSP and SCHIP.

**Table i.4 – SSA Outlays by Program (in millions)**

	<b>FY 2016 Actual</b>	<b>FY 2017 Estimate</b>	<b>FY 2018 Estimate</b>	<b>Change FY 17/FY 18</b>
<b><u>Trust Fund Programs</u></b>				
Old-Age and Survivors Insurance (OASI)	\$769,801	\$804,697	\$858,650	\$53,953
Disability Insurance (DI)	\$146,272	\$147,191	\$151,955	\$4,764
<b>Subtotal, Trust Fund Programs</b>	<b>\$916,073</b>	<b>\$951,888</b>	<b>\$1,010,605</b>	<b>\$58,717</b>
<b><u>Proposed OASDI Legislation:</u></b>				
Reduce 12 month retroactive benefits to 6 months	\$0	\$0	-\$113	-\$113
Increase Overpayment Collection to 10%	\$0	\$0	-\$8	-\$8
Exclude SSA Debts From Discharge in Bankruptcy	\$0	\$0	-\$9	-\$9
<b>Subtotal, Proposed OASDI Legislation</b>	<b>\$0</b>	<b>\$0</b>	<b>-\$130</b>	<b>-\$130</b>
<b>Medicare Access and Chip Reauthorization<sup>1</sup> Act of 2015 (MACRA)</b>	<b>\$0</b>	<b>\$4</b>	<b>\$34</b>	<b>\$30</b>
<b><u>General Fund Programs</u></b>				
Supplemental Security Income (SSI) <sup>2</sup>	\$63,351	\$59,518	\$56,715	-\$2,803
Special Benefits for Certain World War II Veterans	\$3	\$3	\$3	\$0
Recovery Act: National Support Center	\$70	\$21	\$0	-\$21
<b>Subtotal, General Fund Programs</b>	<b>\$63,423</b>	<b>\$59,542</b>	<b>\$56,718</b>	<b>-\$2,824</b>
<b><u>Proposed General Fund Legislation:</u></b>				
Special Immigrant Visa Extension	\$0	\$0	\$3	\$3
Verify Real Property Data	\$0	\$0	-\$12	-\$12
Strengthen Child Support Enforcement	\$0	\$0	-\$3	-\$3
Sliding Scale for SSI Multi-Recipient Families	\$0	\$0	-\$743	-\$743
<b>Subtotal, Proposed General Fund Legislation</b>	<b>\$0</b>	<b>\$0</b>	<b>-\$755</b>	<b>-\$755</b>
<b>TOTAL SSA Outlays, Current Law</b>	<b>\$979,496</b>	<b>\$1,011,435</b>	<b>\$1,067,357</b>	<b>\$55,922</b>
Percent change from FY 2017				5.53%
<b>TOTAL SSA Outlays, Proposed Law<sup>3</sup></b>	<b>\$0</b>	<b>\$0</b>	<b>-\$885</b>	<b>-\$885</b>
<b>TOTAL SSA Outlays, Current &amp; Proposed</b>	<b>\$979,496</b>	<b>\$1,011,435</b>	<b>\$1,066,472</b>	<b>\$55,037</b>

<sup>1</sup> MACRA outlays will not match outlays in the budget appendix.

<sup>2</sup> Federal benefit numbers reflect the most recent estimates from SSA's Office of the Chief Actuary.

<sup>3</sup> This does not include the estimated \$100 million outlay for a disability reform proposal. We are still working through the details of this multi-agency proposal.

**Table i.5 – Current Law- OASDI Outlays and Income (in millions)**

	<b>FY 2016 Actual</b>	<b>FY 2017 Estimate</b>	<b>FY 2018 Estimate</b>	<b>Change FY 17/FY 18</b>
<b><u>Outlays</u></b>				
OASI Benefits	\$762,121	\$797,062	\$850,760	\$53,698
DI Benefits	\$142,963	\$143,946	\$148,750	\$4,804
Other <sup>1</sup>	\$10,989	\$10,880	\$11,095	\$215
<b>TOTAL OUTLAYS, Current Law</b>	<b>\$916,073</b>	<b>\$951,888</b>	<b>\$1,010,605</b>	<b>\$58,717</b>
<b><u>Income</u></b>				
OASI	\$799,904	\$828,168	\$857,649	\$29,481
DI	\$150,363	\$170,879	\$178,501	\$7,622
<b>TOTAL INCOME, Current Law</b>	<b>\$950,267</b>	<b>\$999,047</b>	<b>\$1,036,150</b>	<b>\$37,103</b>

**Table i.6 – Current Law- OASDI Beneficiaries and Average Benefit Payments<sup>2</sup> (in thousands)**

	<b>FY 2016 Actual</b>	<b>FY 2017 Estimate</b>	<b>FY 2018 Estimate</b>	<b>Change FY 17/FY 18</b>
<b><u>Average Number of Beneficiaries</u></b>				
OASI	49,455	50,989	52,612	1,623
DI	10,762	10,636	10,648	12
<b>TOTAL BENEFICIARIES</b>	<b>60,216</b>	<b>61,625</b>	<b>63,260</b>	<b>1,635</b>
<b><u>Average Monthly Benefit</u></b>				
Retired Worker	\$1,345	\$1,364	\$1,410	\$46
Disabled Worker	\$1,166	\$1,170	\$1,200	\$30
Projected COLA Payable in January	0.0%	0.3%	2.8%	2.5%

<sup>1</sup> “Other” includes SSA & non-SSA administration expenses, beneficiary services, payment to the Railroad Retirement Board, and demonstration projects.

<sup>2</sup> Totals may not equal sums of component parts due to rounding

**Table i.7 – Current Law- Supplemental Security Income Outlays<sup>1</sup> (in millions)**

	<b>FY 2016 Actual</b>	<b>FY 2017 Estimate</b>	<b>FY 2018 Estimate</b>	<b>Change FY 17/FY 18</b>
Federal Benefits <sup>23</sup>	\$58,904	\$54,463	\$51,581	-\$2,882
Other <sup>4</sup>	\$4,226	\$5,063	\$5,359	\$296
<b>Subtotal, Federal Outlays</b>	<b>\$63,130</b>	<b>\$59,526</b>	<b>\$56,940</b>	<b>-\$2,586</b>
State Supplementary Benefits	\$2,838	\$2,645	\$2,505	-\$140
State Supplementary Reimbursements	-\$2,617	-\$2,653	-\$2,730	-\$77
<b>Subtotal, Net State Supplementary Payments<sup>5</sup></b>	<b>\$221</b>	<b>-\$8</b>	<b>-\$225</b>	<b>-\$217</b>
<b>TOTAL OUTLAYS, Current Law</b>	<b>\$63,351</b>	<b>\$59,518</b>	<b>\$56,715</b>	<b>-\$2,803</b>

<sup>1</sup> Totals may not equal sums of component parts due to rounding.

<sup>2</sup> There were 13 payments in FY 2016. There are 12 payments in FY 2017 and 11 in FY 2018.

<sup>3</sup> Federal benefit numbers reflect the most recent estimates from SSA’s Office of the Chief Actuary.

<sup>4</sup> “Other” includes beneficiary services, research and administrative costs.

<sup>5</sup> States must reimburse SSA in advance for State Supplementary Payments. There will always be 12 state reimbursements in each fiscal year, but there can be 11, 12, or 13 benefit payments per fiscal year because a monthly payment is advanced into the end of the previous month anytime the due date falls on a weekend or holiday. Hence, the “Net State Supplementary Payment” numbers vary from year-to-year depending on the timing of the October benefit payments at the beginning and end of each fiscal year.

**Table i.8 – SSI Recipients and Benefit Payments<sup>1</sup> (Recipients in thousands)**

	<b>FY 2016 Actual</b>	<b>FY 2017 Estimate</b>	<b>FY 2018 Estimate</b>	<b>Change FY 17/FY 18</b>
<b><u>Average Number of SSI Recipients</u></b>				
Federal Recipients				
Aged	1,108	1,112	1,120	8
Blind or Disabled	7,048	6,974	6,935	-39
<b>SUBTOTAL, FEDERAL RECIPIENTS</b>	<b>8,157</b>	<b>8,086</b>	<b>8,054</b>	<b>-32</b>
State Supplement Recipients (with no Federal SSI payment)	166	163	164	1
<b>TOTAL SSI RECIPIENTS, Current Law</b>	<b>8,323</b>	<b>8,249</b>	<b>8,219</b>	<b>-30</b>
<i>SSI Federal Recipients Concurrently Receiving</i>				
<i>OASDI Benefits (included above)</i>	2,611	2,593	2,586	-7
<b><u>Average Monthly Benefit</u></b>				
Aged	\$394	\$399	\$411	\$12
Blind and Disabled	\$578	\$579	\$594	\$15
<b>AVERAGE, All SSI Recipients</b>	<b>\$553</b>	<b>\$555</b>	<b>\$569</b>	<b>\$14</b>
Projected COLA Payable in January	0.0%	0.3%	2.8%	2.5%

<sup>1</sup> Totals may not equal sums of component parts due to rounding.

**Table i.9 – Special Benefits for Certain WWII Veterans Overview  
(Outlays in millions)**

	<b>FY 2016 Actual</b>	<b>FY 2017 Estimate</b>	<b>FY 2018 Estimate</b>	<b>Change FY 17/FY 18</b>
Federal Benefits	\$ 3	\$ 2	\$ 2	\$ 0
Administration	\$ 0 <sup>1</sup>	\$ 1	\$ 1	\$ 0
<b>TOTAL OUTLAYS</b>	<b>\$ 3</b>	<b>\$ 3</b>	<b>\$ 3</b>	<b>\$ 0</b>
Average Number of Beneficiaries (in thousands)	1	1	0 <sup>2</sup>	-1
Average Monthly Benefit	\$ 382	\$ 381	\$ 389	\$ 8

<sup>1</sup> Less than \$500,000.

<sup>2</sup> Estimated average number of recipients less than 500.



**Table i.10 – Administrative Outlays as a Percent of  
Trust Fund Income and Benefit Payments - FY 2018**

	<b>Percent of Income</b>	<b>Percent of Benefit Payments</b>
OASI	0.3%	0.3%
DI	1.5%	1.8%
OASDI (combined)	0.5%	0.5%
SSI (Federal and State)	N/A	9.6%
<b>TOTAL SSA <sup>1</sup></b>		<b>1.2%</b>

<sup>1</sup> Includes Hospital Insurance (HI) and Supplemental Medical Insurance (SMI) administrative outlays. SSA's calculation of discretionary administrative expenses excludes Treasury Administrative expenses which are mandatory outlays.

**Table i.11 – Tax Rates, Wage Base and Economic Assumptions**

	<b>CY 2016</b>	<b>CY 2017</b>	<b>CY 2018</b>	<b>Change CY 17/CY 18</b>
<b><u>Employer/Employee Rates (each)</u></b>				
OASDI (Social Security)	6.20%	6.20%	6.20%	0.0%
Hospital Insurance (HI) (Medicare)	1.45%	1.45%	1.45%	0.0%
<b>EMPLOYEE TOTAL</b>	<b>7.65%</b>	<b>7.65%</b>	<b>7.65%</b>	<b>0.0%</b>
<b><u>Self-Employment Rates</u></b>				
OASDI (Social Security)	12.40%	12.40%	12.40%	0.0%
HI (Medicare)	2.90%	2.90%	2.90%	0.0%
<b>TOTAL</b>	<b>15.30%</b>	<b>15.30%</b>	<b>15.30%</b>	<b>0.0%</b>
<b><u>Cost of Living Adjustments (COLAs)</u></b>				
January	0.0%	0.3%	2.8%	2.5%
<b><u>Contribution and Benefit Base</u></b>				
OASDI	\$118,500	\$127,200	\$130,200	\$3,000
HI	(no cap)	(no cap)	(no cap)	
<b><u>Annual Retirement Test</u></b>				
Year Individual Reaches Full Retirement Age	\$41,880	\$44,880	\$45,960 <sup>1</sup>	\$1,080
Under Full Retirement Age	\$15,720	\$16,920	\$17,280 <sup>1</sup>	\$360
<b><u>Wages Required for a Quarter of Coverage</u></b>	<b>\$1,260</b>	<b>\$1,300</b>	<b>\$1,340<sup>1</sup></b>	<b>\$40</b>

<sup>1</sup> Estimate.

**Table i.12 – Selected Performance Measures**

FY 2018 Performance Table	FY 2016 Actual <sup>1</sup>		FY 2017 Estimate <sup>2</sup>	FY 2018 Estimate
	52-week	53-week		
<b>Retirement and Survivors Claims</b>				
Retirement and Survivors Claims Completed (thousands)	5,502	5,602	5,782	5,948
<b>Disability Claims</b>				
Initial Disability Claims Receipts (thousands)	2,582	2,638	2,499	2,569
Initial Disability Claims Completed (thousands)	2,627	2,689	2,455	2,500
Initial Disability Claims Pending (thousands)	576	568	612	681
Average Processing Time for Initial Disability Claims (days)	110	110	113	114
<b>Disability Reconsiderations</b>				
Disability Reconsiderations Completed (thousands)	653	667	581	582
Disability Reconsiderations Pending (thousands)	121	121	130	149
Average Processing Time for Disability Reconsiderations (days)	103	103	105	108
<b>Hearings</b>				
Hearings Receipts (thousands)	699	713	632	645
Hearings Completed (thousands)	637	652	683	750
Hearings Pending (thousands)	1,122	1,122	1,071	965
Annual Average Processing Time for Hearings Decisions (days)	543	545	605	600
<b>National 800 Number</b>				
National 800 Number Calls Handled (millions) <sup>3</sup>	N/A	37	35	33
Average Speed of Answer (ASA) (seconds) <sup>3</sup>	N/A	817	970	1,250
Agent Busy Rate (percent) <sup>3</sup>	N/A	8.9%	12%	16%
<b>Program Integrity</b>				
Periodic Continuing Disability Reviews (CDR) Completed (thousands)	N/A	2,107	1,950	1,990
Full Medical CDRs (included above, thousands)	N/A	854	850	890
SSI Non-Medical Redeterminations Completed (thousands)	2,505	2,530	2,522	2,822
<b>Selected Other Agency Workload Measures</b>				
Social Security Numbers (SSN) Completed (millions)	17	17	16	16
Annual Earnings Items Completed (millions)	273	273	273	273
Social Security Statements Issued (millions) <sup>4</sup>	47	48	10	10
<b>Selected Production Workload Measures</b>				
Disability Determination Services Production per Workyear	306	306	301	313
Office of Disability Adjudication and Review Production per Workyear	88	88	96	99
Other Work/Service in Support of the Public -Annual Growth of Backlog (workyears)	N/A	N/A	(1,600)	(3,100)

<sup>1</sup> FY 2016 was a 53-week year for management information purposes. For comparison purposes to FYs 2017 and 2018, we are reporting both 52 and 53-week actual performance data.

<sup>2</sup> A full-year appropriation for FY 2017 was not enacted at the time the FY 2018 President’s Budget was prepared. All FY 2017 figures assume funding at the annualized funding level provided in FY 2017 under Further Continuing and Security Assistance Appropriations Act, 2017.

<sup>3</sup> The data reported for FY 2016 is based on the fiscal year beginning 10/1/2015 and ending on 9/30/2016.

<sup>4</sup> Social Security Statements Issued performance measure includes paper statements only; it does not include electronic statements issued. In FY 2016, my Social Security users accessed their Social Security Statements 40.5 million times.