Social Security Administration Transition Briefing
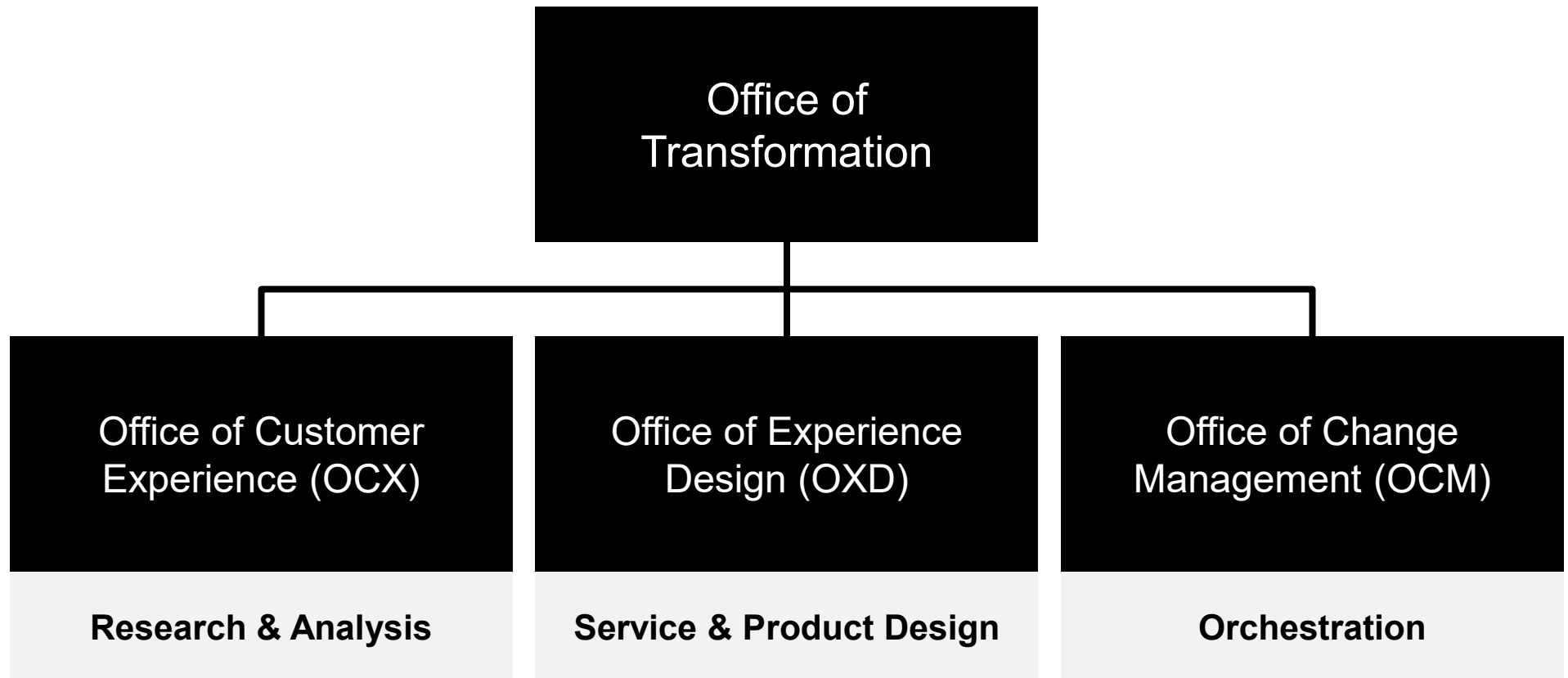
Office of Transformation (OT)

Office of Transformation (OT)

Office of
Transformation

Office of Customer Experience (OCX)	Office of Experience Design (OXD)	Office of Change Management (OCM)
Research & Analysis	**Service & Product Design**	**Orchestration**

Social Security 101

We provide financial protection for individuals and their families against disability, old age, and loss of life.

Our business by customer type:

SSN Holder Solutions	Employer Solutions	Claimant Solutions	Beneficiary Solutions

Social Security 101

	SSN Holder Solutions	Employer Solutions	Claimant Solutions	Beneficiary Solutions

Primary customers
- Citizens by birth/adoption
- Citizens by naturalization
- Non-citizens, primarily those eligible for work

Value of SSN
- Used by SSA to associate eligibility for and distribute benefits
- Used by employers to determine eligibility to work in U.S.
- Used by SSN holders to interact with financial, health, and government organizations

Key customer journeys
- Getting SSN for first time (parents or adults)
- Updating their SSN record (e.g. name change)
- Replacing their SSN card

Social Security 101

	SSN Holder Solutions	**Employer Solutions**	Claimant Solutions	Beneficiary Solutions

Primary customers
- HR professionals at businesses
- Payroll professionals

Key customer journeys
- Hiring a new employee
- Reporting federal tax withholding for employees

Value created
- Establishes individual **earnings record …**
- Earn credits for annual quarters of work
- Typically require 40 credits to be eligible for benefits

Social Security 101

	SSN Holder Solutions	Employer Solutions	**Claimant Solutions**	Beneficiary Solutions

Primary customers
- Individual experiencing a disability
- Individual approaching age 62 or older
- Household experiencing death of wage earner

Key customer journeys
- Applying for benefits (one or more claims)
- Appealing a denial or claim decision

Key concepts
- We support **multiple** benefit programs: Retirement, Disability, Survivors, Family, Supplemental Security Income (SSI), and Medicare
- We evaluate every applicant for ALL programs

Social Security 101

The basic claims process:

Take claim	→	Determine eligibility	→	Process decision	◆	Appeal
						Manage
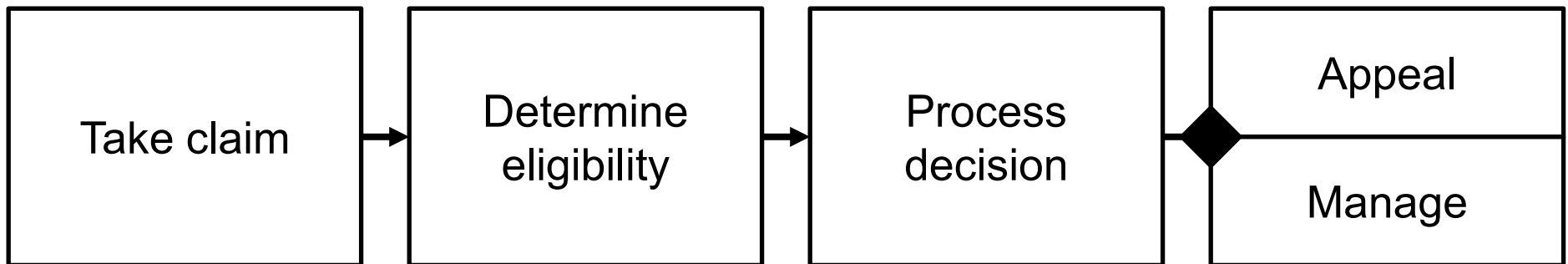
We evaluate:
- Technical criteria
- Medical criteria
- Financial criteria

Social Security 101

Child born with or develops disabling condition before age 18	▪ Supplemental Security Income
Adult becomes unable to work due to disabling condition or terminal illness	▪ Disability benefits ▪ Family benefits ▪ Supplemental Security Income
Adult with dependents dies	▪ Survivor benefits ▪ Supplemental Security Income ▪ Lump sum death payment
Adult attains age 62-70	▪ Retirement benefits, Medicare ▪ Disability benefits ▪ Supplemental Security Income
Spouse dies at age 62+	▪ Spouse/Family benefits ▪ Lump sum death payment

Social Security 101

	SSN Holder Solutions	Employer Solutions	Claimant Solutions	Beneficiary Solutions

Primary customers
- Anyone receiving payments
- Anyone receiving Medicare
- ... and those who support them

Key customer journeys
- Managing monthly payments
- Updating contact or payment information
- Filing annual taxes (1099/1042s)
- (Conducting disability review)
- (Reporting income) … and many more

Takeaway
- About 70 million customers receiving benefits/payments
- Repeat customers!

Social Security 101

Adoption	Approach age 65	Approach age 70	Approach retirement age	Attain age 18	Bankruptcy
Birth	Change in ability to manage	Citizenship change	Contact info change	Death or survivorship	Disability
Document for gov ID	Employment change	Expatriate	File income tax	Fraud or identity theft	Guardianship
Health insurance change	Immigration change	Incarceration change	Income change	Institution or hospital stay	Loss from disaster
Marital status change	Name change	Payment or bank info change	Residence circumstance change	Resource change	**27 life events**

Social Security 101

Those **27 life events** translate into **140 customer tasks**:

|	
Online 230M visitors	**26%** (36 out of 140) customer tasks can be completed online
Call Center 79M callers	**5%** (7 out of 140) customer tasks can be completed in IVR **24%** (33 out of 140) tasks can be completed by agents
Offices 57M callers 30M visitors	**47%** (66 out of 140) tasks can be completed by phones **91%** (128 out of 140) tasks can be completed in-person

Social Security 101

Office of Operations (DCO)

Office of Operations (DCO) - Regions
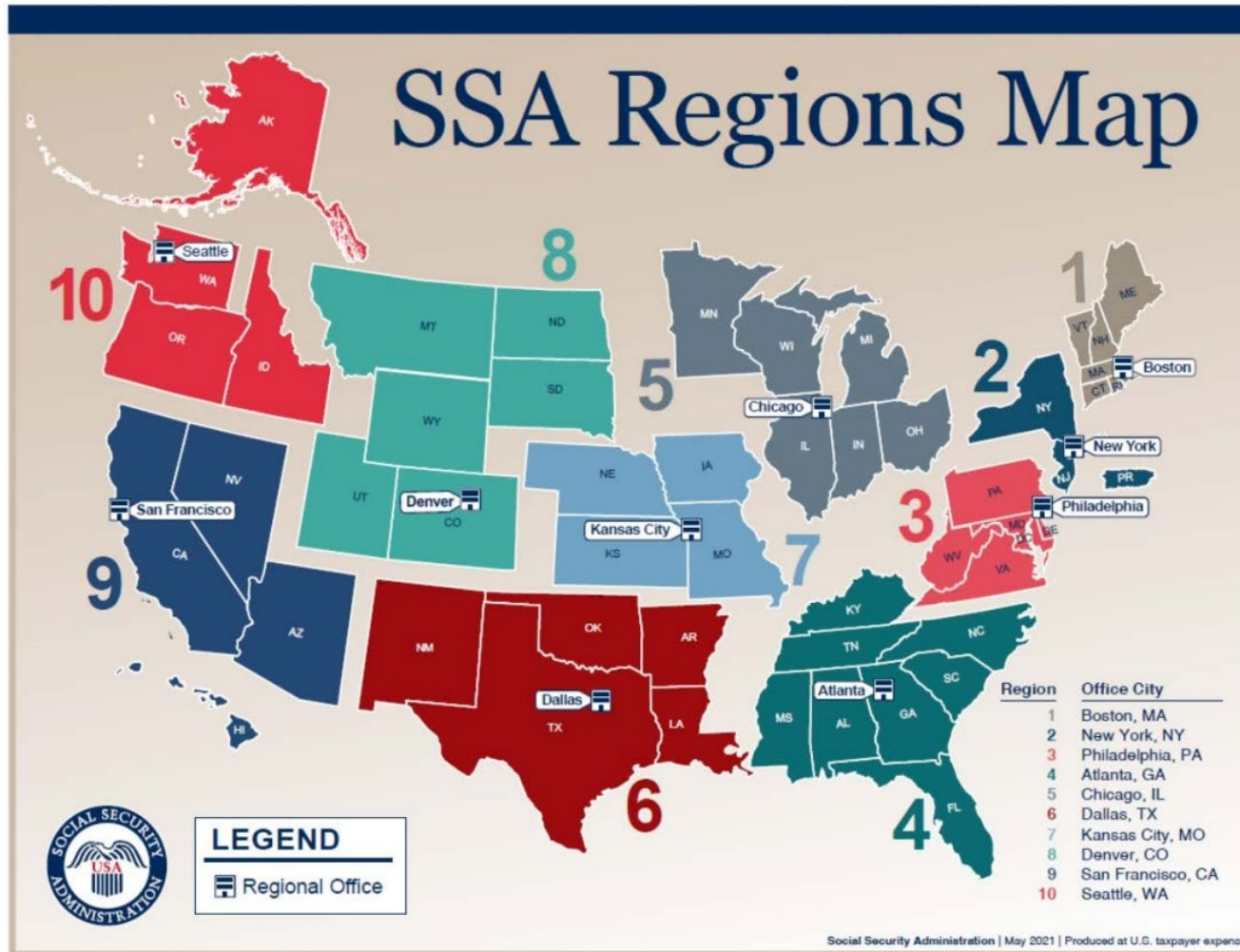
Office of Operations (DCO) – Major Components

Operations consists of approximately 41,000 employees dispersed across the country and includes:

*1,224 field offices   *7 Social Security Card Centers
*23 teleservice centers   *8 processing centers
*51 area director offices   *15 workload support units
*4 headquarters support offices *10 regional offices

Also:
- 21 Federal benefit offices around the world.
- Approximately14,500 State employees who work in 52 disability determination service (DDS) offices responsible for making disability decisions on disability applications below the hearings level.

Office of Operations (DCO) – Org Chart

Office of Operations Organizational Structure

Acting Deputy Commissioner

| Acting Assistant Deputy Commissioner | Acting Assistant Deputy Commissioner | Executive Officers |

Regions
The regional structure includes: a regional office, area directors offices, field offices, teleservice centers, and processing centers*

Office of Central Operations
Associate Commissioner

DCOSS
DCO Support Staff

| **Boston (I)** *Regional Commissioner* | **Dallas (VI)** *Regional Commissioner* |

Office of Disability Operations
Assistant Associate Commissioner

Office of Public Service and Operations Support
Associate Commissioner

Office of Disability Determinations
Acting, Associate Commissioner

| **New York* (II)** *Regional Commissioner* | **Kansas City* (VII)** *Regional Commissioner* |

Office of Earnings International Operations
Acting Assistant Associate Commissioner

Office of Electronic Services and Technology
Associate Commissioner

Office of Customer Service
Associate Commissioner

| **Philadelphia* (III)** *Regional Commissioner* | **Denver/Seattle (VIII)^** *Regional Commissioner* |

| **Atlanta* (IV)** *Regional Commissioner* | **San Francisco* (IX)^** *Regional Commissioner* |

Office of Management and Operations Support
Assistant Associate Commissioner

| **Chicago* (V)** *Regional Commissioner* | **Seattle/Denver (X)^** *Regional Commissioner* |

^The Denver/San Francisco/Seattle regions are operating as one region under one leadership structure.

Office of Operations (DCO) – Key Initiatives

- Mail Centralization Digitization (MCD)

- Appointment Focused Service

- Training

Office of Operations (DCO) – Challenges

- Initial Disability Claims Backlog
- Budget Environment
- Modernizing our IT Systems and Business Process
  - ESS
  - ECC
  - Document Management
- Employee Morale/Retention

Office of Operations (DCO) – Opportunities

- Enterprise Contact Center Solution (ECC) & AWS Expansion

- Increasing Self Service Options

Office of Operations (DCO) – Operating Plan

DCO Operating Plan – FY 2025 GOALS

Disability Claims Goal	RSHI Timeliness Goal
Phone Service Goal – National 800#	Initial Claims Appointments Goal
Phone Service Goal – Field	Hearings Workload Goal
PC Pending, AERO, & BRI Goal	Stewardship Goal

DCO Operating Plan – FY 2024-2025 Two-Year Agency Priority Goals

Phone Service	By September 30, 2025, ASA less than 12 minutes (National 800#).
Supplemental Security Income Underpayment Processing	By September 30, 2025, complete 98 percent of SSI underpayments that have been identified as priority cases or been pending for a year or more at the beginning of FY 2024. (Volume 152,374).

Office of Hearings Operations (OHO)

Objectives
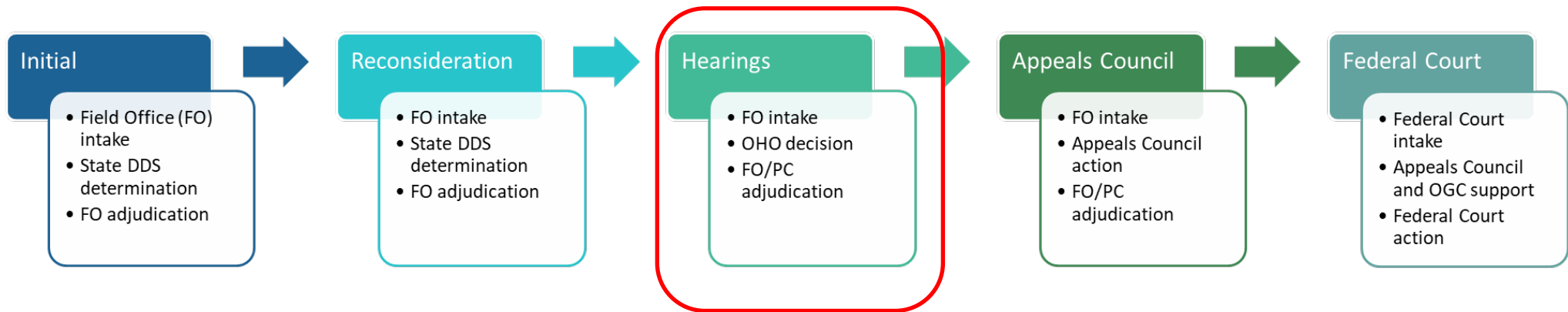
Office of Hearings Operations (OHO) Overview

A Brief Overview of the Disability Process
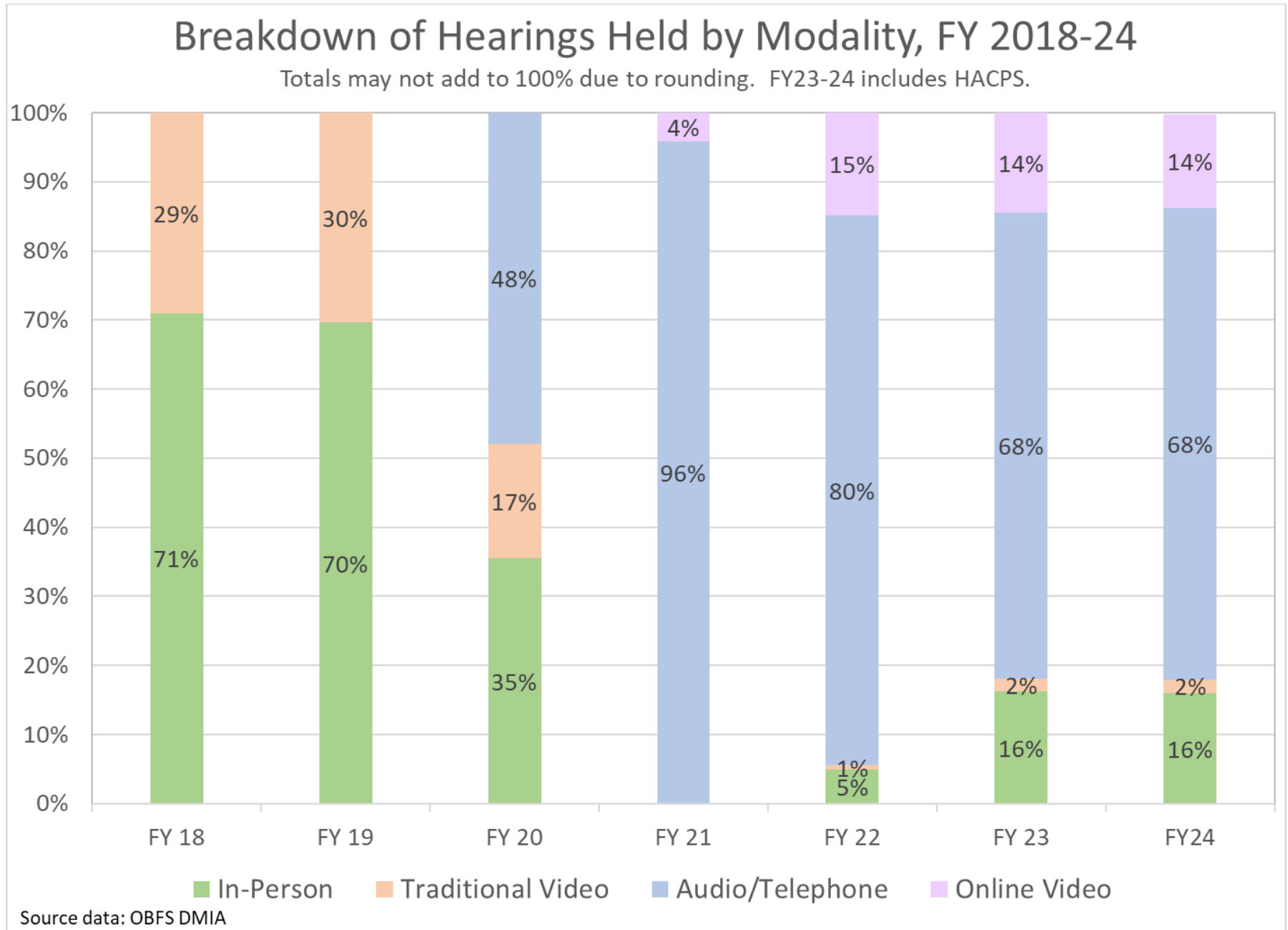
OHO State of Services

Office of Hearings Operations (OHO) Overview

- SSA's administrative appeals operation is one of the largest administrative judicial systems in the world. Under the Office of Hearings Operations (OHO), administrative law judges (ALJ) conduct hearings and issue decisions. OHO issues nearly half a million hearing dispositions each year.

- OHO currently has approximately 7,200 employees across headquarters, 10 regional offices, 161 locally based hearing offices (HO), 5 national hearings centers (NHC), and 5 national case assistance centers (NCAC) that provide support and direct service to claimants seeking appeal under SSA's hearings process.

Brief Overview of the Disability Process

Initial
- Field Office (FO) intake
- State DDS determination
- FO adjudication

Reconsideration
- FO intake
- State DDS determination
- FO adjudication

Hearings
- FO intake
- OHO decision
- FO/PC adjudication

Appeals Council
- FO intake
- Appeals Council action
- FO/PC adjudication

Federal Court
- Federal Court intake
- Appeals Council and OGC support
- Federal Court action

OHO State of Services

Breakdown of Hearings Held by Modality, FY 2018-24

Totals may not add to 100% due to rounding. FY23-24 includes HACPS.

Legend: In-Person, Traditional Video, Audio/Telephone, Online Video

	FY 18	FY 19	FY 20	FY 21	FY 22	FY 23	FY24
In-Person	71%	70%	35%		5%	16%	16%
Traditional Video	29%	30%	17%		1%	2%	2%
Audio/Telephone			48%	96%	80%	68%	68%
Online Video				4%	15%	14%	14%

Source data: OBFS DMIA

OHO State of Services

OHO Headquarters: Washington, DC

Regional Offices **10**

Hearing Offices **161**
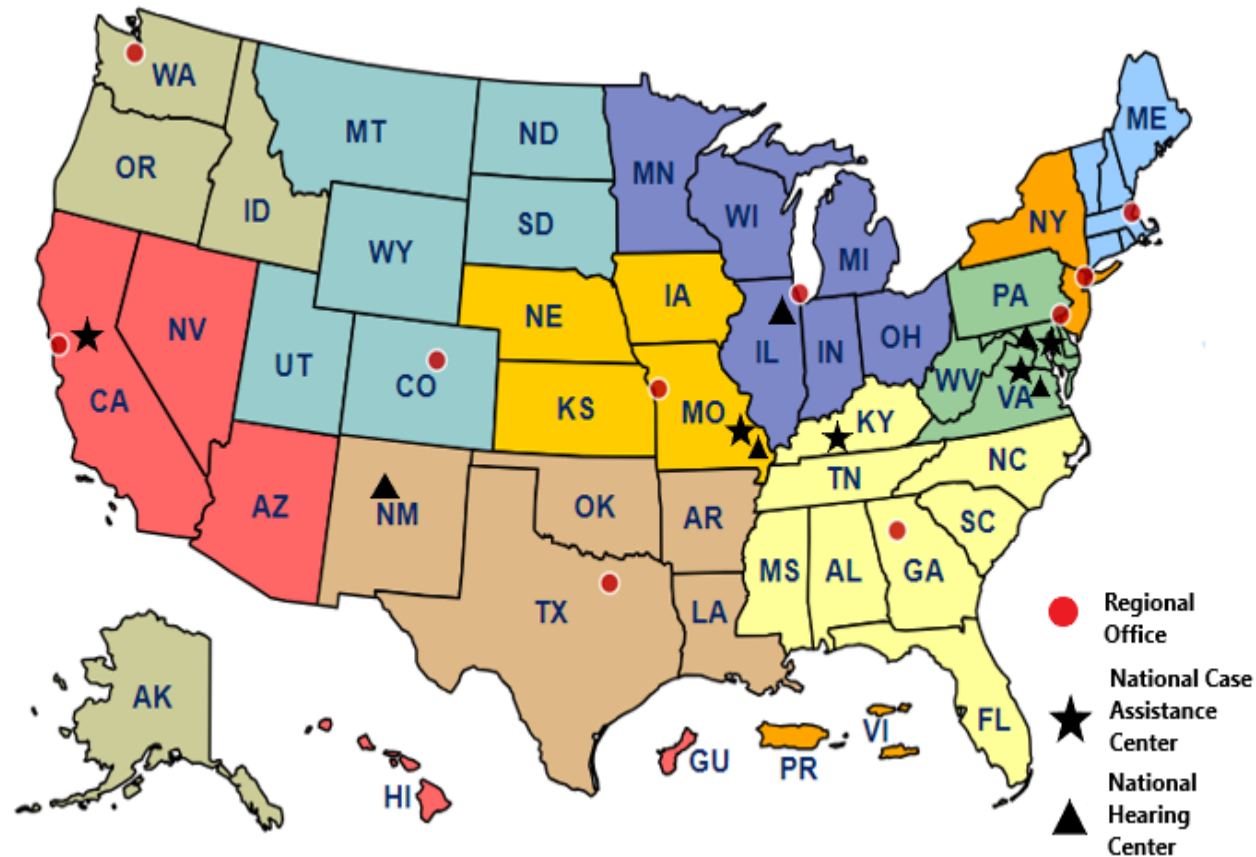
Satellite Hearing Offices **5**

National Service Delivery Central Office **1**

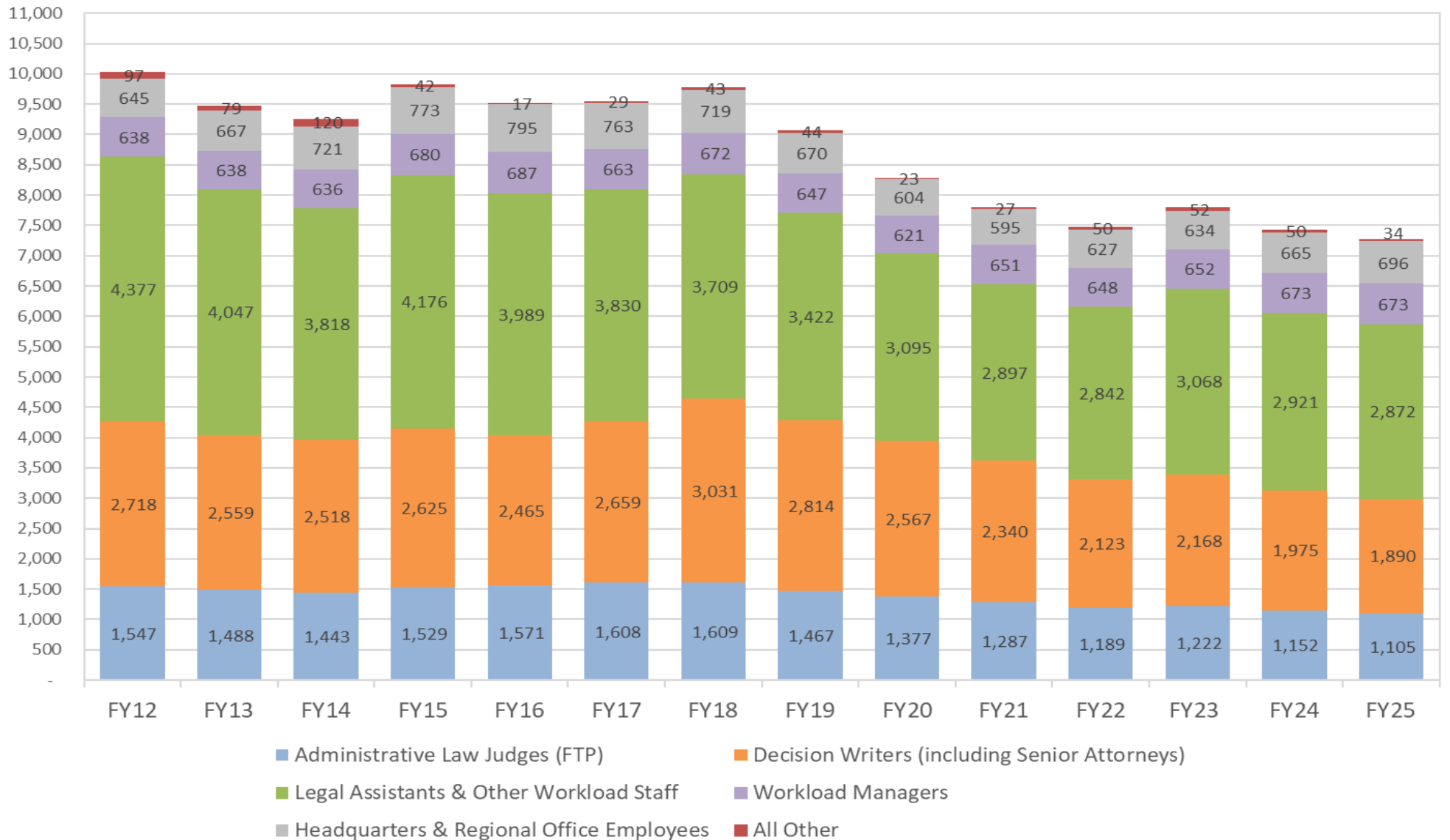National Hearing Center **5**

National Case Assistance Center **5**
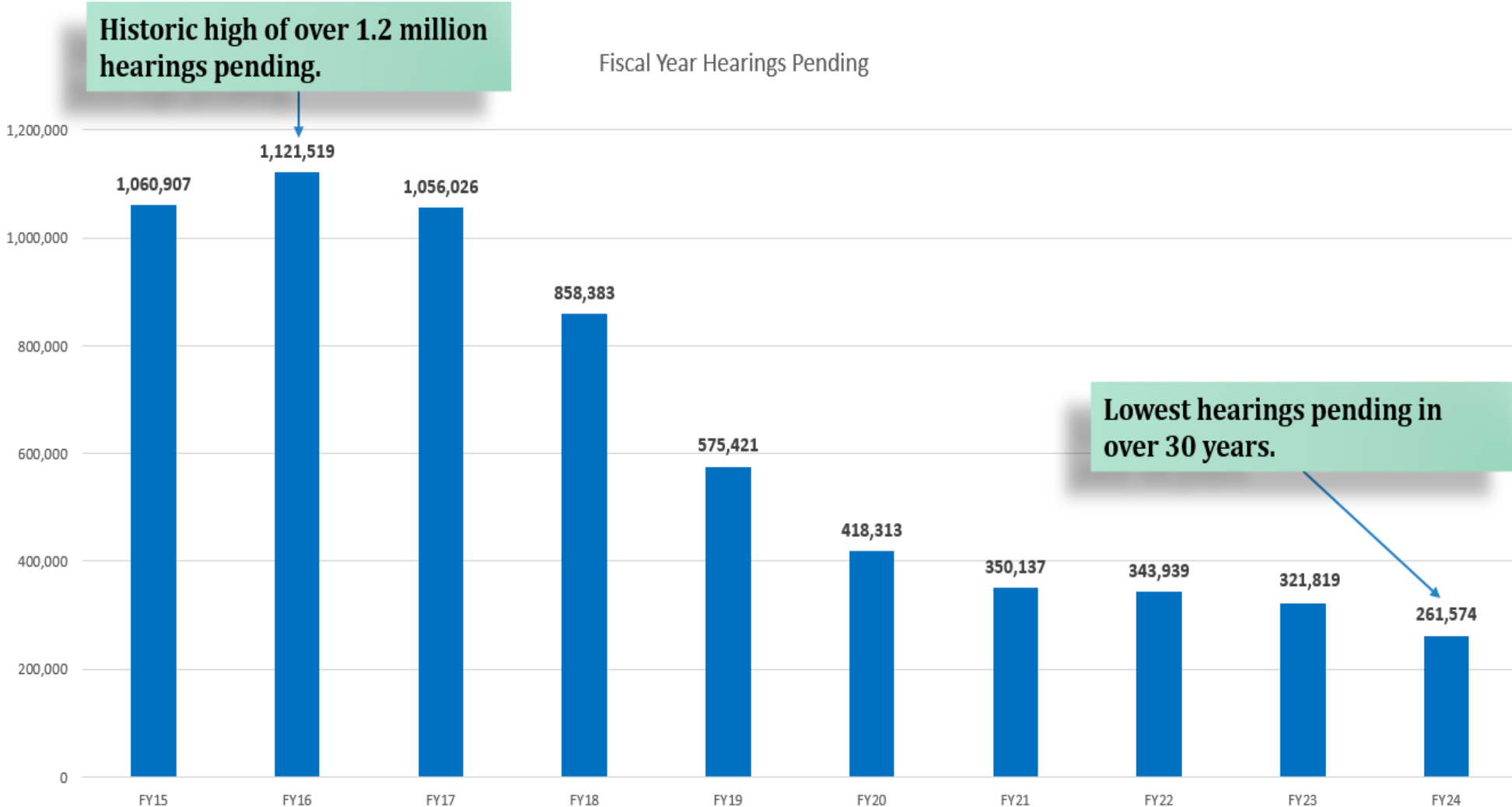
Special Review Cadre **1**

National Adjudication Team **1**
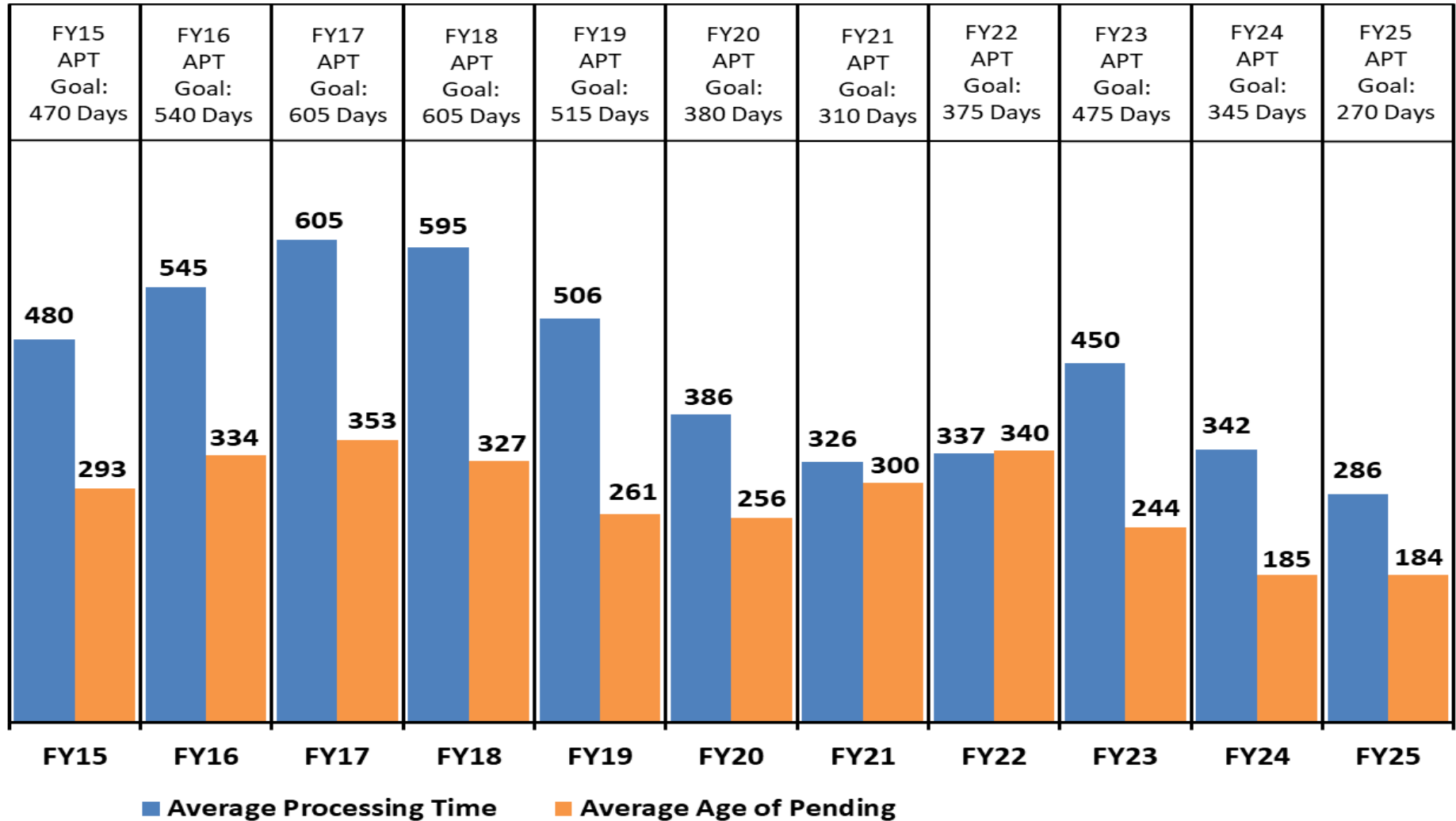
OHO State of Services

OHO Staffing

	FY12	FY13	FY14	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22	FY23	FY24	FY25
All Other	97	79	120	42	17	29	43	44	23	27	50	52	50	34
Headquarters & Regional Office Employees	645	667	721	773	795	763	719	670	604	595	627	634	665	696
Workload Managers	638	638	636	680	687	663	672	647	621	651	648	652	673	673
Legal Assistants & Other Workload Staff	4,377	4,047	3,818	4,176	3,989	3,830	3,709	3,422	3,095	2,897	2,842	3,068	2,921	2,872
Decision Writers (including Senior Attorneys)	2,718	2,559	2,518	2,625	2,465	2,659	3,031	2,814	2,567	2,340	2,123	2,168	1,975	1,890
Administrative Law Judges (FTP)	1,547	1,488	1,443	1,529	1,571	1,608	1,609	1,467	1,377	1,287	1,189	1,222	1,152	1,105

Legend:
- Administrative Law Judges (FTP)
- Decision Writers (including Senior Attorneys)
- Legal Assistants & Other Workload Staff
- Workload Managers
- Headquarters & Regional Office Employees
- All Other

OHO State of Services

Historic high of over 1.2 million hearings pending.

Fiscal Year Hearings Pending

Lowest hearings pending in over 30 years.

FY15: 1,060,907
FY16: 1,121,519
FY17: 1,056,026
FY18: 858,383
FY19: 575,421
FY20: 418,313
FY21: 350,137
FY22: 343,939
FY23: 321,819
FY24: 261,574

OHO State of Services

Hearings Average Processing Time and Age of Pending
FY 2015-25

	FY15 APT Goal: 470 Days	FY16 APT Goal: 540 Days	FY17 APT Goal: 605 Days	FY18 APT Goal: 605 Days	FY19 APT Goal: 515 Days	FY20 APT Goal: 380 Days	FY21 APT Goal: 310 Days	FY22 APT Goal: 375 Days	FY23 APT Goal: 475 Days	FY24 APT Goal: 345 Days	FY25 APT Goal: 270 Days
Average Processing Time	480	545	605	595	506	386	326	337	450	342	286
Average Age of Pending	293	334	353	327	261	256	300	340	244	185	184

Legend: ■ Average Processing Time ■ Average Age of Pending

OHO State of Services

Monthly Average Age of Pending (AAP) and Average Processing Time (APT); September 2023 Through February 14, 2025

APT values: 458, 370, 368, 364, 363, 360, 347, 337, 329, 325, 322, 324, 307, 274, 280, 291, 291, 270

AAP values: 244, 243, 243, 241, 238, 232, 224, 217, 211, 205, 201, 191, 185, 186, 185, 186, 184, 183

X-axis: Sept 23, Oct 23, Nov 23, Dec 23, Jan 24, Feb 24, Mar 24, Apr 24, May 24, Jun 24, Jul 24, Aug 24, Sept 24, Oct 24, Nov 24, Dec 24, Jan 25, Feb 14, 2025

Legend: APT, AAP
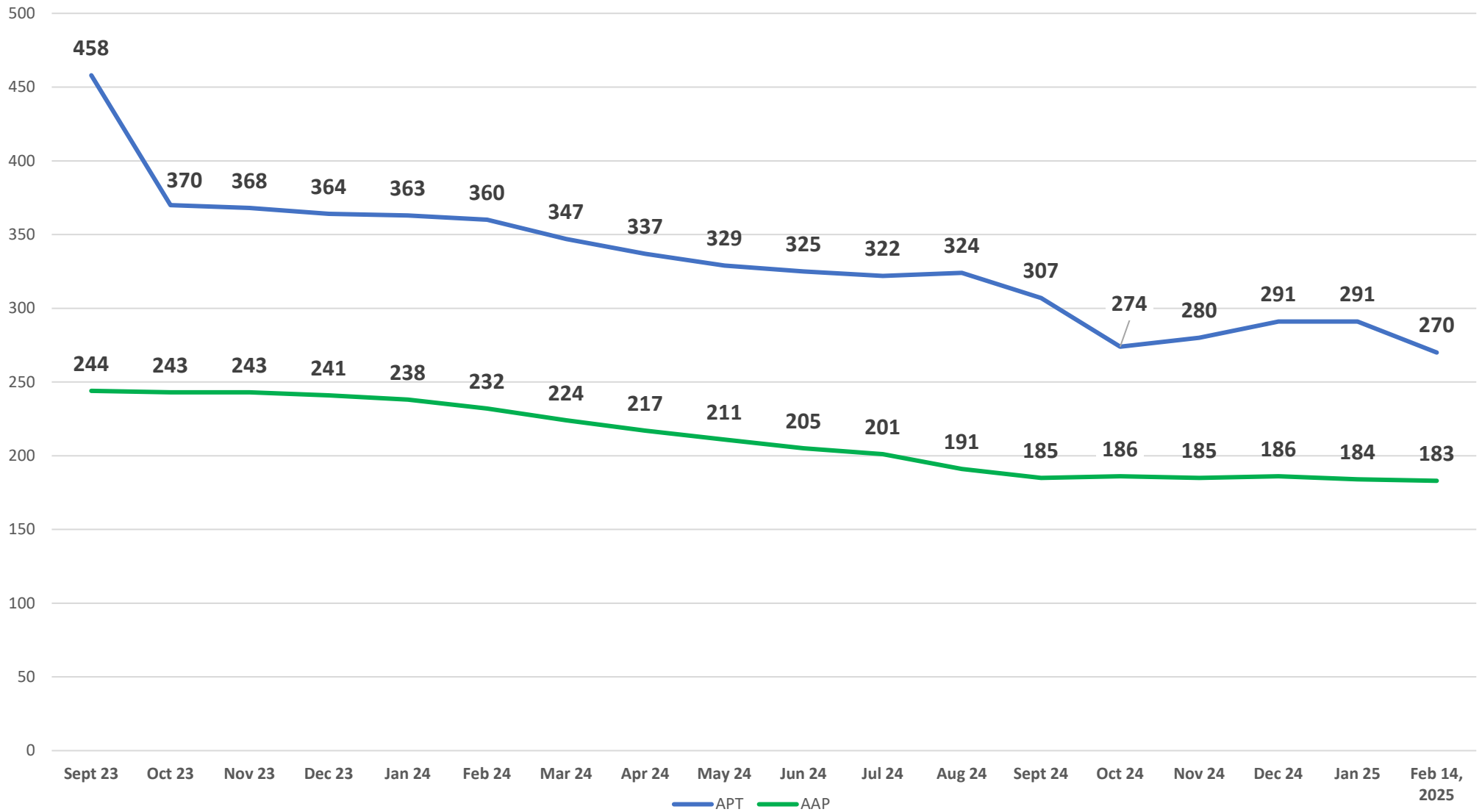
Office of Analytics, Review, and Oversight (OARO)

Office of Analytics, Review, and Oversight (OARO)

Office of Quality Review (OQR)	Office of Appellate Operations (OAO)	Office of Analytics and Improvements (OAI)	Office of Program Integrity (OPI)	Other Offices
Conducts quality reviews of disability and payment decisions. Supports agency partners by adjudicating claims. Executes targeted studies to benchmark accuracy rates and provides data-driven recommendations to improve accuracy.	Provides claimants an appellate level review of administrative law judge decisions and dismissals. Provides data-driven feedback to adjudicators and agency policymakers regarding the implementation of the disability adjudication process.	Deliver data-driven analytic insights, visualizations, and solutions to agency partners to improve agency operations. Devise and deploy AI innovations and automations (e.g., predictive models, decision support systems).	Ensures stewardship by preventing, detecting, and mitigating fraud in our program. Identifies the root cause of improper payments, develops recommendations, and drives corrective actions.	**Chief Data Officer –** Leads data use strategy, governance, the Enterprise Data Warehouse (EDW), and AI use innovation (Senior Level AI Use). **Audit Liaison Staff (ALS) –** Liaison to oversight bodies, coordinates audits participation, and provides oversight of and guidance for audit recommendations.

IMPACT:

OQR DDS Quality – 90.6% threshold required on initial (currently at 95.2%)

OQR Pre Effectuation Review – 50 percent review of allowances for accuracy

OAO Insight – Inline identification of potential errors; TMF for generative AI enhancements

OAI Predictive Models – Save over $2 billion annually; over 341 analytics products to agency partners (e.g., interactive dashboards, quick-turn data-driven answers, etc.)

OPI – Avoided losses due to fraud of approximately 100 million in FY24

CDO – Completed first ever data maturity assessment

ALS – Closed 127 audit recommendations in FY24 with an average age of 1.3 years at closure

Office of the General Counsel (OGC)

Office of the General Counsel (OGC)

- Deliver a full-range of legal services to the Social Security Administration, including representing the agency before Federal appellate and district courts and adjudicative administrative agencies.

- Program litigation, where we defend the agency's benefits decisions in Federal court, comprises around 70% of our attorney time.

- Personnel advice and litigation comprises 20% of our attorney time.

- Our attorneys also provide legal advice and representation on matters involving Social Security and Supplemental Security Income (SSI) programs, appropriations law; procurement and contracts, labor and personnel laws, data exchanges, privacy and disclosure laws, bankruptcy, fraud, and ethics.

- Under 700 employees with a $1.6M budget plus $60M in agency funding to cover payments due under the Equal Access to Justice Act, No Fear Act, settlement payments, and other attorney fees.

Office of Budget, Finance, and Management (OBFM)

Office of Budget, Finance, and Management (OBFM)

BFM provides leadership on key agency programs and initiatives, including administration of:

- Budget formulation, execution, and justification;

- Acquisition and grants program;

- Accounting and financial reporting;

- Internal control and enterprise risk management programs;

- Strategic planning and performance reporting;

- Facilities and logistics management; and

- Physical security, continuity of operations, and emergency preparedness.

BFM Key Results

- Accountable for $1.5 trillion program budget and more than $14 billion administrative budget

- Fiscal year (FY) 2024 marked the 31st consecutive year SSA received an unmodified opinion on our financial statements

- Reduced SSA's real property footprint by 3.1 million square feet since FY 2015, including reducing by over 846,000 usable square feet and saving $18 million in lease avoidance costs in FY 2024

- Moved printing of 9 million notices to a central print vendor since FY 2022, saving $28 million in cost avoidance and removing work from field offices

- Increased electronic repayments and processed about $1.4 million debtor remittances in FY 2024 for over $1 billion

- Completed nearly 5,000 contract actions for about $2 billion and over 400 grant actions for about $89 million in FY 2024

Office of Acquisitions and Grants (OAG)

Major Functions:
- Oversee the agency-wide acquisition and grants program, including the agency's purchase card program
- Promote competition and socioeconomic activities, including supporting small business programs and category management
- Ensure our Contracting Officers maintain their Federal Acquisition Career-Contracting certification through training and experience awarding various contracts

Key Workloads:
- Streamline Acquisition Procedures (estimated to increase timeliness of approximately 50 sole source justifications)
- Enhance Use of Category Management (award at least $200 million in accordance with spend under management principles)
- Achieve Small Business Goals
  - Small Business: 37 percent
  - Subcontracting: 55 percent
- Award Vocational Experts Blanket Purchase Agreement (BPA) (approximately 650 BPAs by the end of the fiscal year)

Office of Budget (OB)

Major Functions:
- Formulate a detailed budget for the agency three times each fiscal year (FY) (i.e., Commissioner's Budget, President's Budget, and Congressional Operating Plan), including specific workload and performance commitments for the Annual Performance Plan/Report
- Serve as lead liaison with House and Senate appropriations and budget committees, the Congressional Budget Office, and OMB on budget related matters and confidential technical assistance requests
- Execute the agency's program and administrative budget and prepares administrative cost estimates for enacted and proposed regulatory and legislative changes.

Key Workloads:
- Execute FY 2025 Budget to Support Priorities/Prepare Congressional Operating Plan (due 45 days after annual appropriation)
- Develop FY 2026 President's Budget and FYs 2025–2026 Annual Performance Plan (due TBD, estimated between March-May 2025)
- Develop FYs 2026-2030 Agency Strategic Plan Outline (due to OMB May 30, 2025)
- Continue Organizational Health and Performance Reporting (ongoing quarterly)

Office of Financial Policy and Operations (OFPO)

Major Functions:
- Direct the agency's benefit payment certification operations and central accounting and financial reporting activities, including coordinating the financial statement audit
- Integrate the agency's financial management systems with administrative processes
- Direct the agency's administrative payments and travel management

Key Workloads:
- Resume Treasury Offset Program (pending decision, will take at least 12 months to resume)
- Modernize Program Debt Collection (modernization of all pieces of SSA's debt management processes, including use of government-wide shared services)
- Transition to new Direct Express Financial Partner (transition to Treasury Department's new financial agent, Bank of New York)
- Prepare Financial Statements (quarterly beginning in January)
- Support Annual Financial Statement Audit (December 2024–November 2025)
- Coordinate Agency Internal Control Programs (ongoing)
- Publish Agency Financial Report (due November 17, 2025)

Office of Facilities and Logistics Management (OFLM)

Major Functions:
- Work with the General Services Administration (GSA) to support our agency's facilities nationwide to ensure effective space utilization, including major construction projects, as well as daily operations and maintenance for the HQ campus and regional delegated buildings
- Lead agency-wide priority projects, such as central print, mail centralization and digitization, and public-facing redesign plan
- Implement occupational health and safety programs to ensure employee and customer health and safety in all agency-occupied sites

Key Workloads:
- Continue Real Property Efficiency Efforts (anticipate 270,000 square feet reduction)
- Align Public-Facing Space with Current Service Models (re-examine space standards for over 1,200 public facing offices)
- Improve Notice Program and Increase Central Print Notices (anticipate nearly 200 workyear savings through central print)
- Expand Mail Centralization and Digitization (plan to centrally scan 250,000 pieces of mail, resulting in 2.25 million digitized images)
- Complete GSA Water Testing Program (completed water testing in 891 SSA buildings to date)

Office of Security and Emergency Preparedness (OSEP)

Major Functions:
- Oversee the agency's physical and protective security program, including partnering with the Federal Protective Service to protect our facilities, employees, and visitors nationwide
- Manage the agency's parking and credentialing operations
- Coordinate the agency's continuity of operations program, as well as manages the incident command center, coordinates communications during emergencies, and oversees the agency's occupant emergency program

Key Workloads:
- Oversee Participation in Continuity of Operations Exercise (Eagle Horizon - June or July 2025)
- Implement Executive Order 14111, Interagency Security Committee (complete full verification of the agency portfolio in FY 2025)
- Pursue the Protective Security Officer Policy/Statistical Model (consistency in physical security service across the enterprise)

Office of Human Resources (OHR)

Office of Human Resources: Mission/Purpose

- We recruit, hire, develop, motivate, and support employees through all stages of their career.

- We collaborate across the agency to advise and support managers and supervisors.

- We equip employees with the necessary HR tools, processes, and knowledge to accomplish SSA's mission.

Office the Deputy Commissioner

- Lead the overall HR mission of the agency.

- Supervise the major components of OHR and direct service support to the Agency's executive personnel activities and other high-level special categories.

Office of Executive and Special Services

- Develop and implement all SSA policies and activities relating to the Agency's executive level personnel management program.

- Recruit for and place individuals in positions in the Senior Executive Service (SES) and Senior Professionals (SL/ST) in accordance with OPM regulations.

- Provide staff support to the Executive Resources Board in administering a systematic program to manage SSA's executive and professional resources and ensuring the appropriate selection of candidates to participate in executive development programs.

- Provide staff support to the Performance Review Board in reviewing performance plan and subsequent appraisals of career and non-career executives in SES, SL/ST, and employees in equivalent levels positions.

Office of Personnel

- Direct a comprehensive personnel management program that develops, implements, and maintains fully integrated and coordinated personnel policies and procedures responsive to the needs of SSA.

- Conduct personnel management and performance evaluations and manage HR delegations of authority.

- Manage recruitment and placement, employee recognition, personnel security and suitability for employees and contractors, employee pay and benefits including health, transit subsidy, workers' compensation, and retirement, position classification and organization management, employee assistance services including counseling, and work life services.

- Provide transactional staffing and benefit services to all SSA headquarters employees, Administrative Law Judges nationwide, the Office of the Inspector General, Office of General Counsel, and Office of Analytics Review and Oversight.

Office of Labor Management and Employee Relations

- Carry out the labor and employee relations (LR/ER) mission of the agency including the national relationships with SSA's three labor partners: the American Federation of Government Employees (AFGE), the National Treasury Employees Union (NTEU), and the International Federation of Technical and Professional Engineers-Association of Administrative Law Judges (IFPTEAALJ).

- Manage the agencywide LR/ER programs, including direct service to all headquarters components and providing oversight for LR/ER activities conducted by staff within the Office of Operations and Office of Hearings Operations.

- Represent the Agency before third parties like the Federal Labor Relations Authority (FLRA), Federal Service Impasses Panel (FSIP), and other external stakeholders.

Office of Operational Human Resources Services

- Provide nationwide staffing, benefits, and suitability services for over 47k agency employees (80% of SSA staff) in Operations, Office of Central Operations, and Office of Hearings Operations.

- Communicate updates with employees, managers, and stakeholders (e.g., policy changes, procedures), and advise individual customers on personnel programs and policies.

- Develop, deliver, and maintain a repository of training on recruitment, hiring actions, benefits, etc.

- Conduct internal audits to measure and satisfy regulatory requirements delegated to SSA by OPM, maintain proficiency and certification for delegated examining functions, and track internal processes for consistency and quality.

Office of Strategy, Learning, and Workforce Development

- Manage the agency's strategic workforce planning and talent development services to support and maintain SSA's high-performing workforce.

- Identify, design, deliver, and evaluate workforce development solutions through workforce analytics, assess training needs and outcomes, and adult-based and curriculum-based learning, as well as establishing talent management tools and workforce development governance with a focus on customer needs.

Office of Information Technology for Human Resources

- Design, develop, and execute major aspects of systems planning and operations for OHR. The Office serves as point of contact for equipment, software, and operational IT problems and needs within DCHR.

- Oversee OHR's IT security plans, operations, and direct and manage the IT budget and investments for DCHR.

- Manage the internal applications development process, including assessing user needs, developing system pilots, designing system framework, testing systems, administering database infrastructure, provide training artifacts, and evaluating overall system performance.

Key Initiatives

Time and Attendance Migration

- SSA is replacing the legacy webTA software with GovTA to ensure continuity in payroll processing and improve usability. Implementation is planned for April 2026 but may be subject to acceleration. This migration is critical as the current system has reached its end-of-life. New software will ensure the continuity of payroll processing and improve employee usability.

Top Challenges

Onboarding

- Governmentwide focus on onboarding efficiency is increasing. The SSA onboarding process involves multiple steps and handoffs across components, including suitability screening, credentialing, IT provisioning, and employee orientation. Currently, there is no system to track the process end-to-end, limiting visibility and efficiency. SSA is collaborating with internal partners to enhance tracking and streamline onboarding

Opportunities

Workforce Data and Analytics

- SSA is expanding data analytics capabilities to meet growing demand for workforce insights.

- New tools, such as the Strategic Workforce Analysis Tool (SWAT), provide components with self-service access to workforce planning and analytical data.

- Custom analytics now incorporate geospatial information, and SSA has enhanced its review of Federal Employee Viewpoint Survey data to better inform strategic decision-making.

- Quarterly HR STAT sessions with agency leadership promote actionable use of HR data and further component-level analyses.

Opportunities

Office Restructuring

- OHR is realigning HR functions previously housed within operational components, consolidating staffing, payroll, classification, benefits, and suitability under a centralized model.

- This restructuring aims to increase efficiency, streamline processes, and implement best practices.

- Anticipated benefits include enhanced oversight, reduced redundancy, improved decision-making, and better alignment with agency goals.

Partners

Partners	
OHR's Customers	**Union Partners**
Union Management Cooperation Councils (UMCC)	Office of Personnel Management (OPM)
Department of the Interior (DOI)	Department of Defense (DOD)
Chief Human Capital Operating (CHCO) Council	Executive Review Board (ERB)
Performance Review Board (PRB)	Workforce Planning Governance Board (WPGB)

Office of the Chief Information Officer (OCIO)

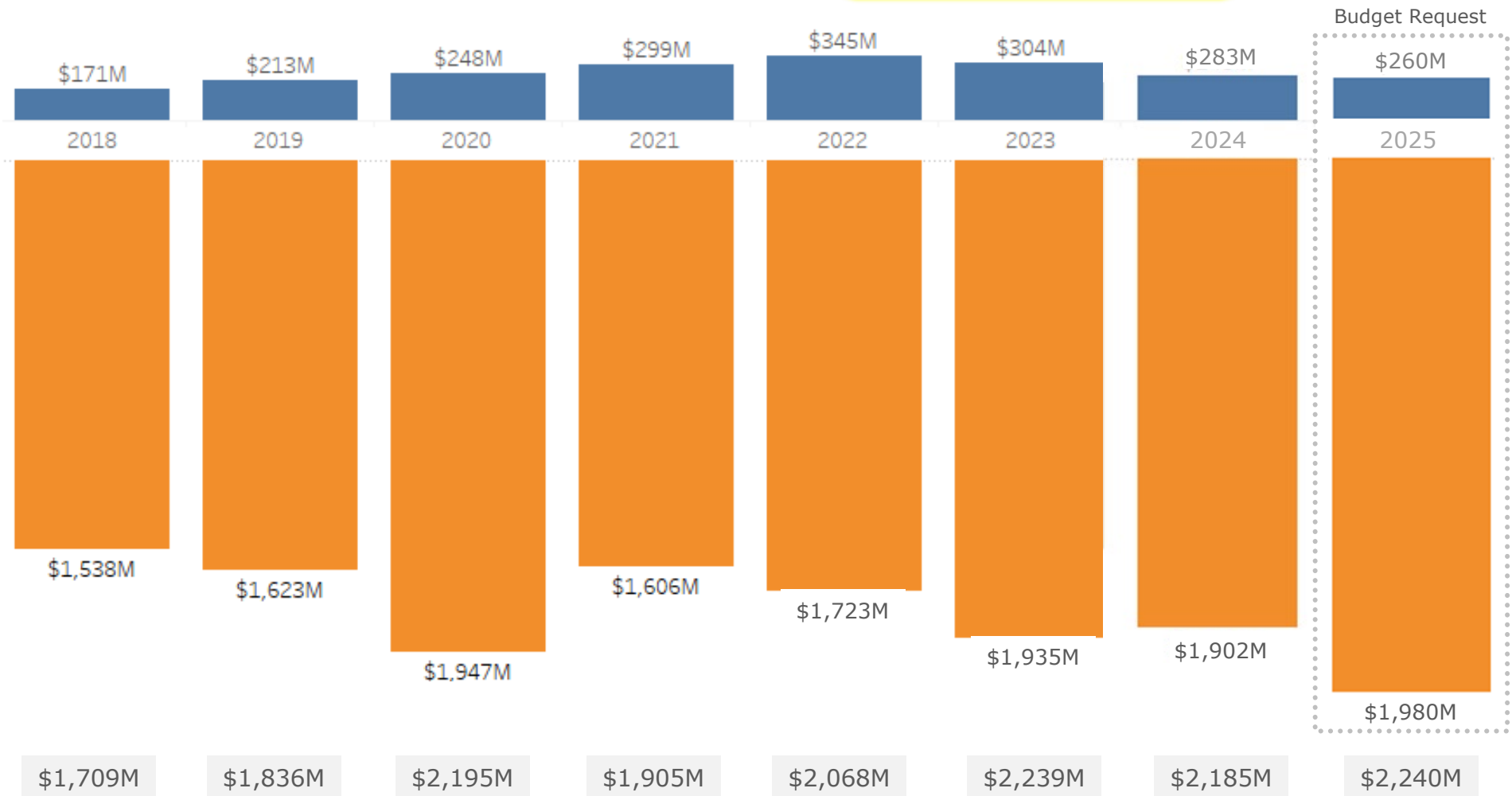# Office of the Chief Information Officer (OCIO)

- **Responsibility:** IT Budget/Investments, Architecture, Infrastructure, Cybersecurity, IT applications, Data Management, Technology Innovation, Data Centers, and IT Governance

- **FY24 Support**
  - 1,400 Locations
  - 228 Million SSA.gov visitors
  - Over 90,000 end user devices and 5,000 mobile devices
  - 17,000+ compute devices (virtual machines)
- **Enterprise Availability of 99.5%**
  - 417 Million Transaction Daily
  - 224 Million average cloud transactions
  - Storage capacity: 226 Petabytes with 20 Cloud Petabytes

Office of the Chief Information Officer (OCIO)

- **Vision** - We envision a future where customers have easy access to social security programs and services, where data informs our innovations and improves decision-making, and where our agency leads in digital transformation, setting a standard for excellence in federal government.

- **Mission** - Our mission is to use innovative technology and data strategically to meet customer needs, foster collaboration and continuous improvement, and create a resilient digital infrastructure that empowers our workforce, enhances lives, and promotes transparency, efficiency, security, and accessibility

Office of the Chief Information Officer (OCIO)

IT Spending: Grow and Transform **vs** **Maintain and Run**

Budget Request

Year	Grow and Transform	Maintain and Run	Total
2018	$171M	$1,538M	$1,709M
2019	$213M	$1,623M	$1,836M
2020	$248M	$1,947M	$2,195M
2021	$299M	$1,606M	$1,905M
2022	$345M	$1,723M	$2,068M
2023	$304M	$1,935M	$2,239M
2024	$283M	$1,902M	$2,185M
2025	$260M	$1,980M	$2,240M

Office of the Chief Information Officer (OCIO)

Cost Drivers

- **Unfunded** regulatory mandates

- **Cyber Security-** threat mitigation, vulnerability management

- Increased fixed cost (**inflation**)

- **Increase** in beneficiaries

- **New** business needs

- **Cloud** costs

- Capability **Duplication**

- Increasing technology support/maintenance (**Legacy**)

Office of the Chief Information Officer (OCIO)

- **FY25 Key Investments**
  - Benefits Modernization
  - National Case Processing System (NCPS)
  - Analytics and Disability Decision Support (ADDS) – IMAGEN
  - Digital Notifications
  - Enterprise Contact Center
  - Technician Experience
  - Online Experience
  - Upload Documents/eSignature
- **Key Initiatives**
  - Cybersecurity
  - Target Architecture

Office of the Chief Information Officer (OCIO)

- **Top Challenges**
  - Technical Debt
  - Budget
  - Talent Retention
  - Fraud Prevention
  - Cybersecurity
  - Digital Identity

- **Promising Opportunities**
  - Improved Investment and Performance Monitoring
  - Artificial Intelligence (AI)
  - Modern Online Services

Office of Retirement and Disability Policy (ORDP)

Office of Retirement and Disability Policy (ORDP)

- 450 Staff in five AC components:
  - Office of Disability Policy (ODP)
  - Office of Income Security Programs (OISP)
  - Office of Data Exchange, Policy Publications, and International Negotiations (ODEPPIN)
  - Office of Research, Demonstration, and Employment Support (ORDES)
  - Office of Research, Evaluation and Statistics (ORES)
- **Key Issues:**
  - Social Security Fairness Act (SSFA)
  - Payroll Information Exchange (PIE)
  - Data Exchanges
  - Health Information Technology (HIT)
  - 21st Century PolicyNet
  - E-Verify

Office of Legislation and Congressional Affairs (OLCA)

Office of Legislation and Congressional Affairs (OLCA)

WHAT WE DO: Manage most legislative, congressional, and regulatory activity in SSA. Responsibilities:

- Preparing SSA officials to testify before Congress
- Informing SSA leaders and staff about Congressional action related to Social Security
- Coordinating the development of legislation to improve SSA programs
- Responding to Congressional casework, letters, and briefings requests
- Developing SSA's regulations, rulings, and Federal Register Notices
- Managing Office of Management and Budget (OMB) approval for SSA's public facing forms

Office of Legislation and Congressional Affairs (OLCA)

How does OLCA measure performance? Satisfied customers (Congress, agency stakeholders, OMB, etc.) are the best measure of our performance. We plan to explore ways to measure customer satisfaction. Below is data on OLCA workloads:

OLCA Workload Highlights	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24
Hill Requests						
Congressional casework completed	10,149	9,064	8,299	7,392	6,934	6,191
Information requests (data and program inquiries)		350	197	317	108	87
Congressional briefings, meetings, and calls	118	92	101	84	75	99
Congressional Priority Correspondence (CPCs)	50	60	41	36	26	43
Technical assistance for draft bill language		95	60	70	62	66
Legislative Bulletins issued / Legislative Summaries	8	12	14	6 / 6	5 / 7	4/2
Congressional Update Newsletter	N/A	1	5	5	3	3
Hearings	0	1	4	1	4	8
Reports clearance and regulations						
Paperwork Reduction Act (PRA) clearances		27	27	26	164	164
Regulations published	14	10	8	8	10	9
Agency and OMB Requests						
Inter-component/inter-agency reviews (audits, Legislative Referral Memoranda, etc)	243	625	430	371	724	637

Office of Communications (OCOMM)

Office of Communications (OCOMM)

Office of the Deputy Commissioner with Press Office

Office of Public Inquiries and Communications Support

- Responds to written inquiries to Commissioner, other, and referred from White House.

- Provides accessible communications (captioning / audio publications).

- Provides agency translation services.

- Agency Initiatives:

  - Limited English Proficiency.

  - Plain Language.

  - Social Security Statement.

Office of Communications (OCOMM)

Office of Strategic and Digital Communications

- Leads strategic marketing and planning.

- Develops internal and external communications products.

- Coordinates non-media communications with regional and local public affairs.

- Directs social media development and engagement.

- Liaises with national organizations.

- Advances intergovernmental affairs, including State and local governments.

- Conducts outreach to specialized audiences.

- Creates video, photography, and graphics.

- Performs agency web design, development, and administration of certain webpages.

Office of the Chief Actuary (OCACT)

Office of the Chief Actuary (OCACT)

Overview

- Performs actuarial estimates and analyses for the Social Security (OASDI) and Supplemental Security Income (SSI) programs and for any proposed changes in those programs.

- Provides technical and consultative services to the Commissioner, agency staff, Congressional staff, and the Social Security Board of Trustees, among others.

Office of the Chief Actuary (OCACT)

Key Workloads

Name	Overview
Social Security Trustees Report	Annual report on the actuarial status of the Old-Age and Survivors Insurance and Disability Insurance Trust Funds, with projections extending 75 years into the future. Policymakers, legislators, and the general public rely on this report for the financial status of the program and use it as a baseline for possible legislation or other changes to the programs.
Annual Report on the Supplemental Security Income (SSI) Program	Provide 25-year projections of Federal SSI payments, as well as a comprehensive overview of the SSI program and select data on program participation. Policymakers, legislators, and the general public rely on this report for the projections of payments under this program and use it as a baseline for possible legislation or other changes to the program.
Estimates of Legislative Proposals to Change the Social Security Program	Develop detailed letters and memoranda analyzing the financial effects of proposed changes to the Social Security program. Some of these proposals are intended to ensure the long-range solvency of the program, while others focus on narrower aspects of program rules. These analyses are typically requested by members of Congress or the Administration.
Estimates of Proposed Regulatory Changes to the Social Security and SSI Programs	Develop detailed memoranda analyzing the changes in program cost of proposed changes to the Social Security and SSI programs. These analyses are typically requested by the Commissioner, Deputy Commissioners, and the Office of Management and Budget.

Office of the Chief Actuary (OCACT)

Focus on: Trustees Report and Solvency

- The Commissioner of Social Security is one of four members of the Social Security and Medicare Boards of Trustees, along with the Secretaries of Treasury (managing Trustee), HHS, and Labor.

- The Social Security Act requires that the Board of Trustees, among other duties, report annually to the Congress on the actuarial status and financial operations of the OASI and DI Trust Funds.

- OCACT provides expert input to the process each year, including making recommendations, and preparing the demographic, economic, beneficiary, and cost projections required for the report.

- The Board of Trustees is scheduled to release the annual report in spring 2025. You can read the 2024 Trustees Report here.

Office of the Chief Actuary (OCACT)

Focus on: Trustees Report and Solvency

- The estimates in the 2024 Trustees Report show that the combined Social Security trust funds will become depleted in 2035.

- If Congress does not enact legislative change by then, scheduled tax revenues will be sufficient to pay only about three-fourths of the scheduled benefits.

- Policymakers have developed numerous proposals and options that have financial effects on the Social Security Trust Funds with the intent of addressing the long-range solvency problem.

- OCACT has prepared detailed actuarial analysis for many of these proposals, including the estimated effect on the financial status of the Social Security program. A complete list of the proposals scored is available here.

Office of Civil Rights and Equal Opportunity (OCREO)

Office of Civil Rights and Equal Opportunity (OCREO)

- Mission/Purpose

- Major Functions

- Key Initiatives

- Opportunities

- Stakeholders

Telephone Strategy

National 800 Number

TSC Sites and Staffing

January 2025 Staffing:
4,518
(Customer Service Reps & Leads)

Legend
- ⊙ TSC
- ▲ TSC with MySSA Help Desk

- 800-Number sites take calls from 8 AM to 7 PM local time
- 24 Answering sites nationwide
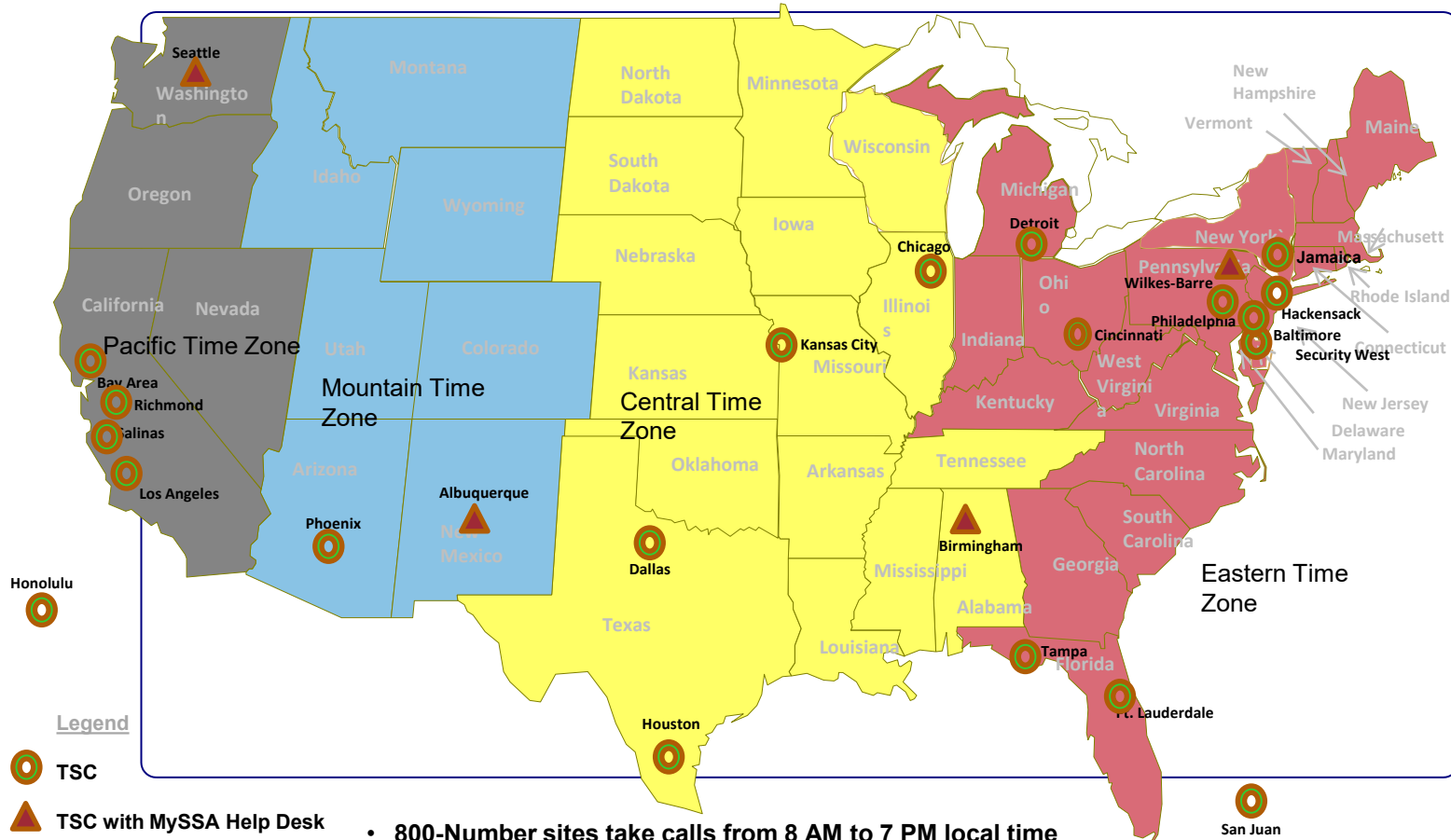
Amazon Web Services (AWS) Connect

- National 800 Number

- Employer 800 Number

- OIG hotline

- All Workload Support Units (WSUs)

- Georgia Field Offices

National 800 Number Network (N8NN)
FY25 Performance Dashboard
Please be aware that the dashboard refreshes daily at 9:45 am. For the latest data, kindly check after 10:00 am.

Go to FY24 Performance Dashboard

Daily Date Selector:
2/14/2025

FYTD Data Through:
2/14/2025

| Daily Performance For: 2/14/2025 Metrics below include AWS and NGTP calls	Level Day 4
Network Calls Received	315,031
Agent Calls Offered	218,803
Agent Calls Handled	102,170
Agent Answer Rate*	**46.7%**
Busy Calls	0
Agent Busy Rate (ABR)*	0.0% ●
Average Speed of Answer (ASA) In Minutes	27.9 ●
Average Queue Wait Time – English (hh:mm:ss)	01:39:38
Average Queue Wait Time – Spanish (hh:mm:ss)	00:34:22
Average Time To Callback (hh:mm:ss)	02:06:05
Average Handle Time (AHT) In Minutes	9.4
Logged In FTEs (For the Day)	2,044
% of Calls Handled via Call Back Assist (CBA)	**69.1%**
Automation Calls Handled (IVR)**	

FYTD Performance Through 2/14/2025 Metrics below include AWS and NGTP calls	
Network Calls Received	35,925,010
Agent Calls Offered	23,288,008
Agent Calls Handled	11,031,332
Agent Answer Rate*	**47.4%**
Busy Calls	343,842
Agent Busy Rate (ABR)*	1.5% ●
Average Speed of Answer (ASA) In Minutes	21.0 ●
Average Queue Wait Time – English (hh:mm:ss)	01:27:11
Average Queue Wait Time – Spanish (hh:mm:ss)	00:27:15
Average Time To Callback (hh:mm:ss)	02:10:33
Average Handle Time (AHT) In Minutes	9.1
Average Logged In FTEs (For the Fiscal Year)	2,382
% of Calls Handled via Call Back Assist (CBA)	**73.6%**
Automation Calls Handled (IVR)**	

FYTD % of Customer Calls Served By An Agent
Agent Calls Handled/Network Calls Received

30.7%
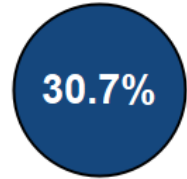
Go to N8NN Metric Definitions Page

FY 2025 KPI Goals
ABR Goal = 1% or less
ASA Goal = 12 minutes or less

Notes
*Agent Answer Rate and Agent Busy Rate (ABR) are based on Agent Calls Offered.
** AWS Automation Calls Handled (IVR) coming soon.

KPI Goal Performance Color Scale Reference

Exceeds the goal by 10% or more	● (dark green)
Meets the goal and/or outperforms the goal up to 10%	● (green)
Missed the goal by up to 5%	● (yellow)
Missed the goal by 5% to 10%	● (orange)
Missed goal by 10% or more	● (red)

ALERT! Daily & FYTD data is incomplete as of 2/14/2025 due to cutover of TTY.

Monthly Trends: Answer Rate & Average Speed of Answer (ASA) | Data Through 2/14/2025

Answer Rate

Oct	Nov	Dec	Jan	Feb
59.8%	55.5%	44.0%	38.2%	41.9%

Average Speed of Answer (ASA) in Minutes

Oct	Nov	Dec	Jan	Feb
12.7	15.9	23.0	29.7	28.1

Rolling 30 Day Performance

Select a date from which to calculate the 30 day rolling averages below: 2/17/2025

Calculated Date Range: 1/19/2025 to 2/17/2025

Agent Answer Rate	41.3%
Agent Busy Rate	1.9% ●
Average Speed of Answer (ASA) in Minutes	27.8 ●
% of Calls Handled via Call Back Assist (CBA)	72.2%

N8NN | Network Calls Received (NCR)

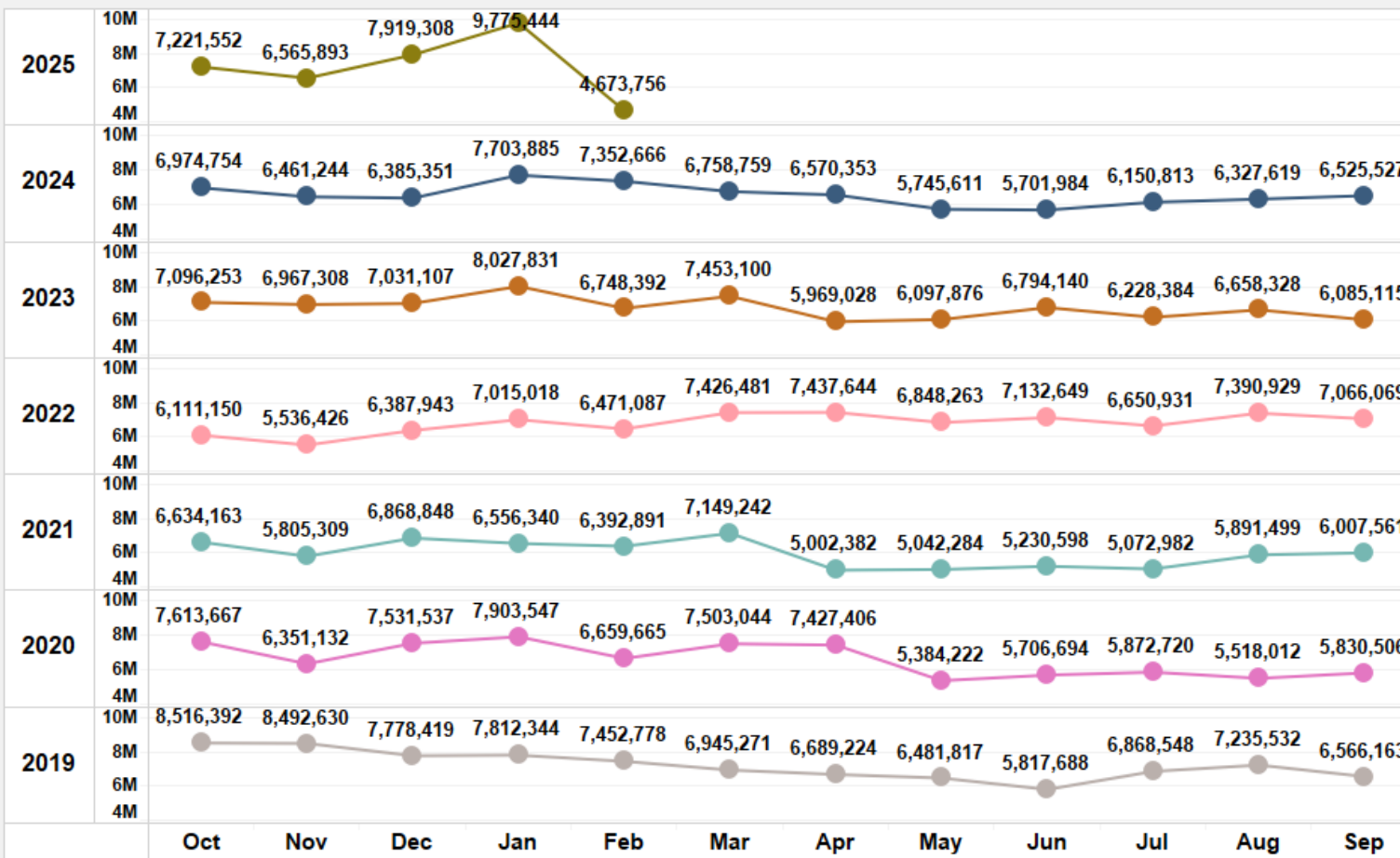## Monthly Network Calls Received By Fiscal Year
Data Available From 10/1/2018 To 2/17/2025

Showing Data Through: 2/17/2025

Network Calls Received By Fiscal Year

Fiscal Year	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total
2025	7,221,552	6,565,893	7,919,308	9,775,444	4,673,756								36,155,953
2024	6,974,754	6,461,244	6,385,351	7,703,885	7,352,666	6,758,759	6,570,353	5,745,611	5,701,984	6,150,813	6,327,619	6,525,527	78,658,566
2023	7,096,253	6,967,308	7,031,107	8,027,831	6,748,392	7,453,100	5,969,028	6,097,876	6,794,140	6,228,384	6,658,328	6,085,115	81,156,862
2022	6,111,150	5,536,426	6,387,943	7,015,018	6,471,087	7,426,481	7,437,644	6,848,263	7,132,649	6,650,931	7,390,929	7,066,069	81,474,590
2021	6,634,163	5,805,309	6,868,848	6,556,340	6,392,891	7,149,242	5,002,382	5,042,284	5,230,598	5,072,982	5,891,499	6,007,561	71,654,099
2020	7,613,667	6,351,132	7,531,537	7,903,547	6,659,665	7,503,044	7,427,406	5,384,222	5,706,694	5,872,720	5,518,012	5,830,506	79,302,152
2019	8,516,392	8,492,630	7,778,419	7,812,344	7,452,778	6,945,271	6,689,224	6,481,817	5,817,688	6,868,548	7,235,532	6,566,163	86,656,806

Legend: 2025, 2024, 2023, 2022, 2021, 2020, 2019
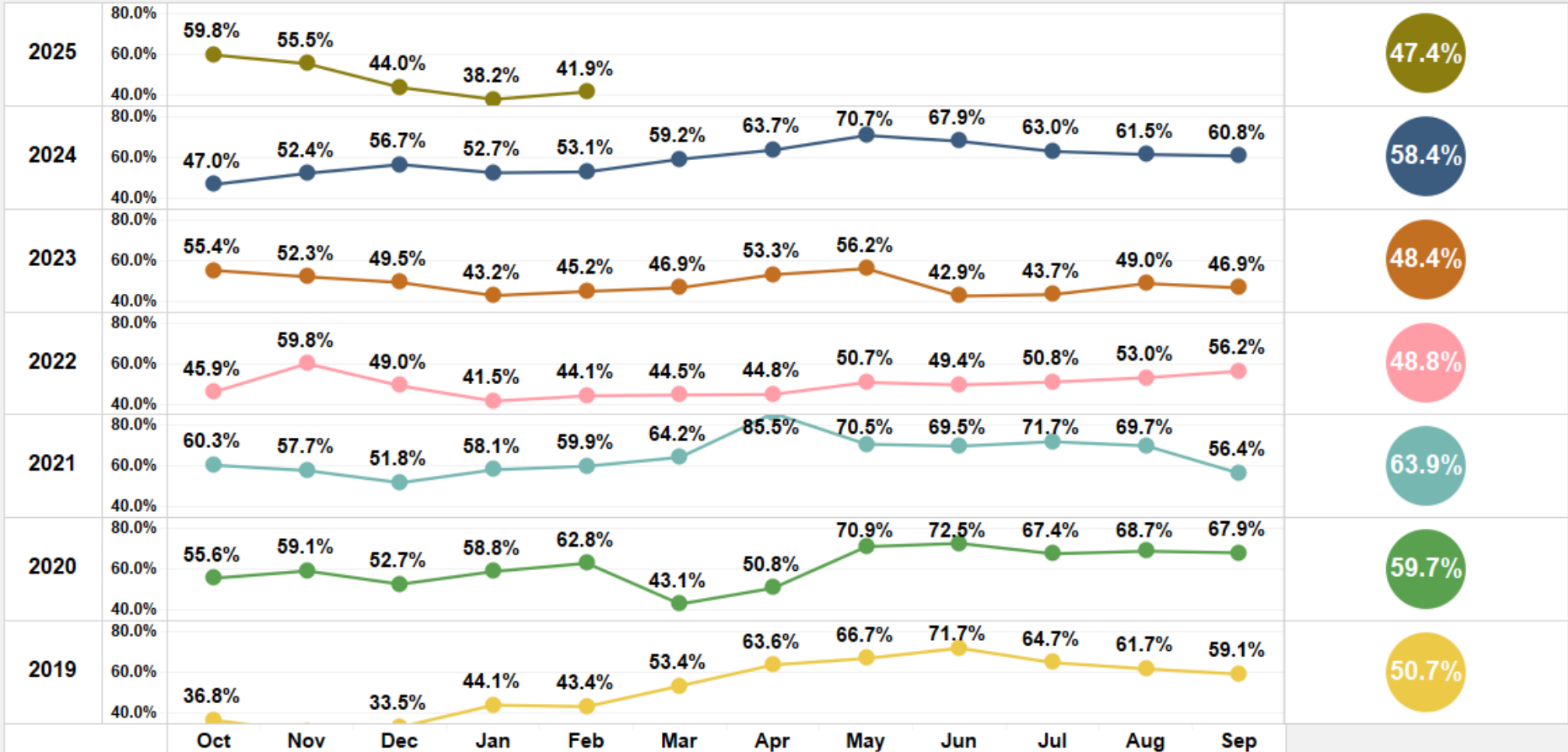
SECURITY STAT

Monthly Answer Rate By Fiscal Year
Answer Rate= Calls Answered/Calls Offered.
Data Available From 10/1/2018 To 2/17/2025

Showing Data Through:
2/17/2025

Overall Answer Rate By Fiscal Year

Fiscal Year
- ☑ 2025
- ☑ 2024
- ☑ 2023
- ☑ 2022
- ☑ 2021
- ☑ 2020
- ☑ 2019

2025
- Oct: 59.8%
- Nov: 55.5%
- Dec: 44.0%
- Jan: 38.2%
- Feb: 41.9%
- Overall: 47.4%

2024
- Oct: 47.0%
- Nov: 52.4%
- Dec: 56.7%
- Jan: 52.7%
- Feb: 53.1%
- Mar: 59.2%
- Apr: 63.7%
- May: 70.7%
- Jun: 67.9%
- Jul: 63.0%
- Aug: 61.5%
- Sep: 60.8%
- Overall: 58.4%

2023
- Oct: 55.4%
- Nov: 52.3%
- Dec: 49.5%
- Jan: 43.2%
- Feb: 45.2%
- Mar: 46.9%
- Apr: 53.3%
- May: 56.2%
- Jun: 42.9%
- Jul: 43.7%
- Aug: 49.0%
- Sep: 46.9%
- Overall: 48.4%

2022
- Oct: 45.9%
- Nov: 59.8%
- Dec: 49.0%
- Jan: 41.5%
- Feb: 44.1%
- Mar: 44.5%
- Apr: 44.8%
- May: 50.7%
- Jun: 49.4%
- Jul: 50.8%
- Aug: 53.0%
- Sep: 56.2%
- Overall: 48.8%

2021
- Oct: 60.3%
- Nov: 57.7%
- Dec: 51.8%
- Jan: 58.1%
- Feb: 59.9%
- Mar: 64.2%
- Apr: 85.5%
- May: 70.5%
- Jun: 69.5%
- Jul: 71.7%
- Aug: 69.7%
- Sep: 56.4%
- Overall: 63.9%

2020
- Oct: 55.6%
- Nov: 59.1%
- Dec: 52.7%
- Jan: 58.8%
- Feb: 62.8%
- Mar: 43.1%
- Apr: 50.8%
- May: 70.9%
- Jun: 72.5%
- Jul: 67.4%
- Aug: 68.7%
- Sep: 67.9%
- Overall: 59.7%

2019
- Oct: 36.8%
- Dec: 33.5%
- Jan: 44.1%
- Feb: 43.4%
- Mar: 53.4%
- Apr: 63.6%
- May: 66.7%
- Jun: 71.7%
- Jul: 64.7%
- Aug: 61.7%
- Sep: 59.1%
- Overall: 50.7%

Legend: 2025, 2024, 2023, 2022, 2021, 2020, 2019

Data Source: OCS Operational MI/BI Portal

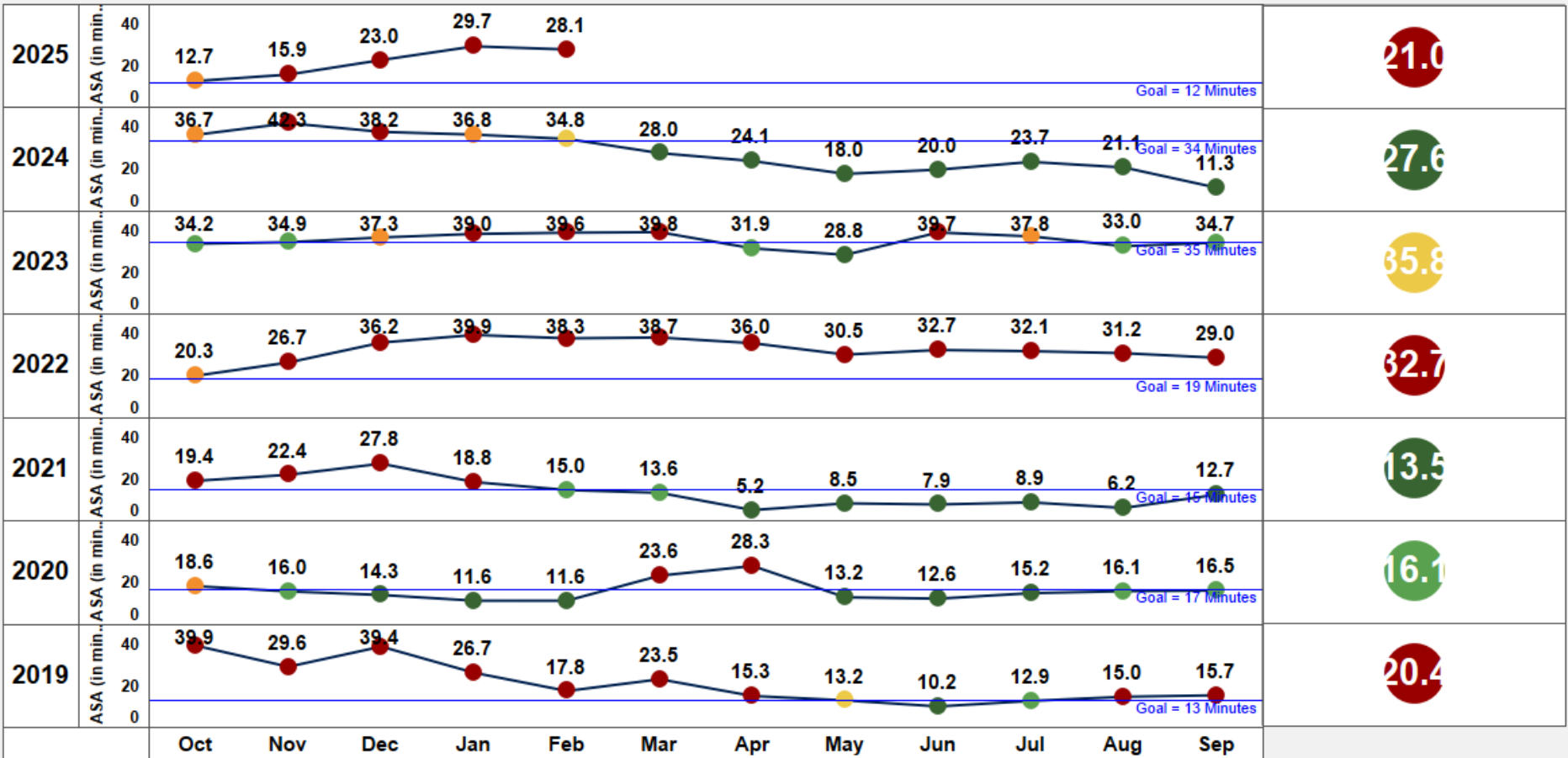# N8NN | Average Speed of Answer (ASA)

Monthly Average Speed of Answer (ASA) in minutes By Fiscal Year
Average Speed of Answer= Answer Wait Time/Agent Calls Answered.
Data Available From 10/1/2018 To 2/17/2025

Showing Data Through:
2/17/2025

Overall ASA By Fiscal Year

Fiscal Year
- ☑ 2025
- ☑ 2024
- ☑ 2023
- ☑ 2022
- ☑ 2021
- ☑ 2020
- ☑ 2019

2025: Oct 12.7, Nov 15.9, Dec 23.0, Jan 29.7, Feb 28.1 — Goal = 12 Minutes — Overall: 21.0

2024: Oct 36.7, Nov 42.3, Dec 38.2, Jan 36.8, Feb 34.8, Mar 28.0, Apr 24.1, May 18.0, Jun 20.0, Jul 23.7, Aug 21.1, Sep 11.3 — Goal = 34 Minutes — Overall: 27.6

2023: Oct 34.2, Nov 34.9, Dec 37.3, Jan 39.0, Feb 39.6, Mar 39.8, Apr 31.9, May 28.8, Jun 39.7, Jul 37.8, Aug 33.0, Sep 34.7 — Goal = 35 Minutes — Overall: 35.8

2022: Oct 20.3, Nov 26.7, Dec 36.2, Jan 39.9, Feb 38.3, Mar 38.7, Apr 36.0, May 30.5, Jun 32.7, Jul 32.1, Aug 31.2, Sep 29.0 — Goal = 19 Minutes — Overall: 32.7

2021: Oct 19.4, Nov 22.4, Dec 27.8, Jan 18.8, Feb 15.0, Mar 13.6, Apr 5.2, May 8.5, Jun 7.9, Jul 8.9, Aug 6.2, Sep 12.7 — Goal = 15 Minutes — Overall: 13.5

2020: Oct 18.6, Nov 16.0, Dec 14.3, Jan 11.6, Feb 11.6, Mar 23.6, Apr 28.3, May 13.2, Jun 12.6, Jul 15.2, Aug 16.1, Sep 16.5 — Goal = 17 Minutes — Overall: 16.1

2019: Oct 39.9, Nov 29.6, Dec 39.4, Jan 26.7, Feb 17.8, Mar 23.5, Apr 15.3, May 13.2, Jun 10.2, Jul 12.9, Aug 15.0, Sep 15.7 — Goal = 13 Minutes — Overall: 20.4

Months: Oct, Nov, Dec, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep

Legend:
- ■ Exceeds the goal by 10% or more (dark green)
- ■ Meets the goal and/or outperforms up to 10% (light green)
- ■ Missed the goal by up to 5% (yellow)
- ■ Missed the goal by 5% to 10% (orange)
- ■ Missed goal (red)

SECURITY STAT — SOCIAL SECURITY ADMINISTRATION

Data Source: OCS Operational MI/BI Portal
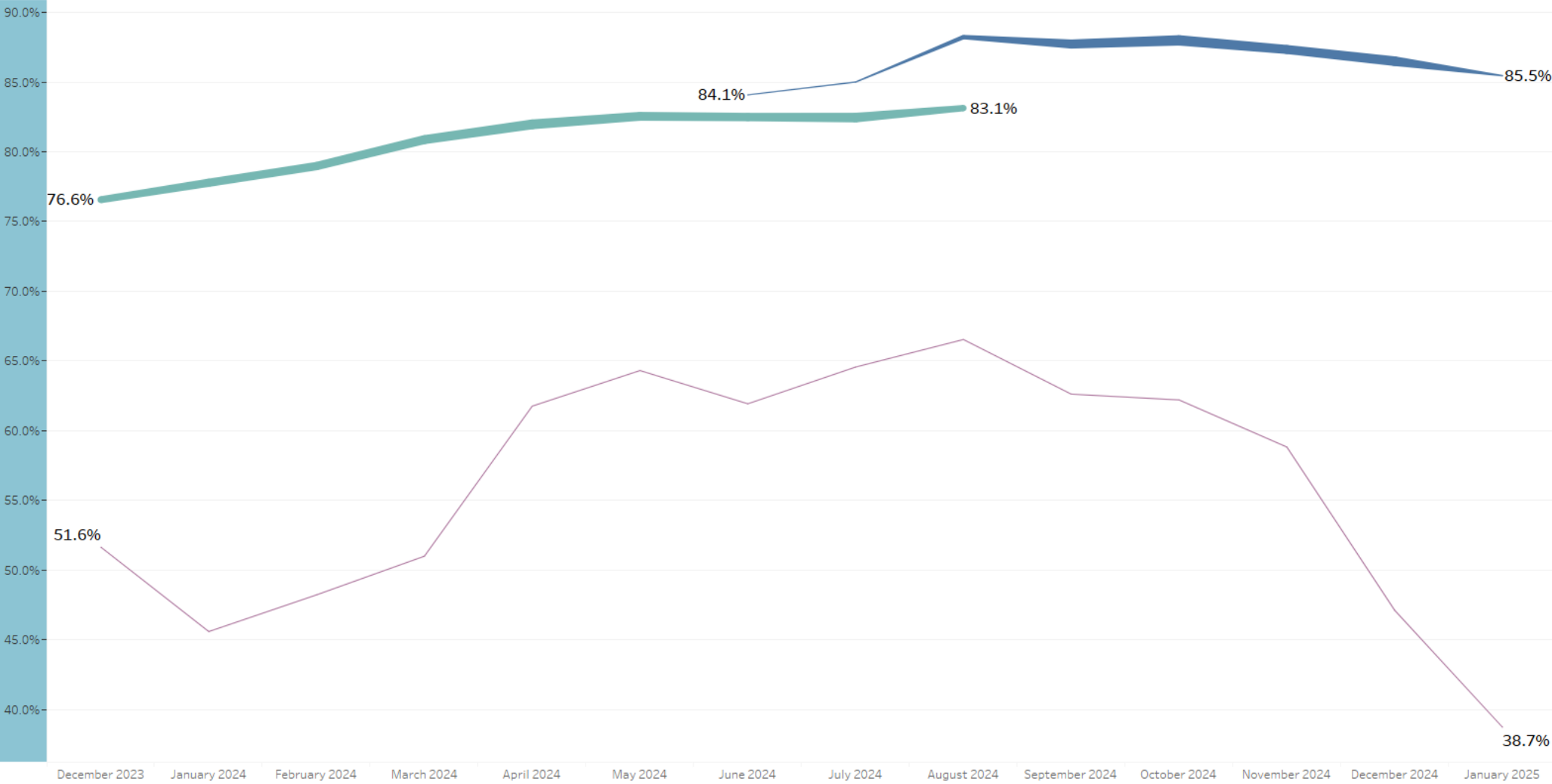
Additional Key Data Points

Fiscal Year	Agent Calls Offered	Agent Calls Handled	Calls Handled by Automation	Total Calls Handled	Agent Busy Rate
FY19	56,194,877	28,464,527	5,031,988	33,496,515	14.1%
FY20	50,487,044	30,119,002	4,361,130	34,480,132	7.4%
FY21	48,276,885	31,246,009	3,253,946	34,499,955	0.2%
FY22	54,743,093	26,995,189	2,516,313	29,511,502	6.0%
FY23	51,933,760	25,133,420	4,402,255	29,535,675	8.3%
FY24	48,158,148	28,140,754	3,660,577	31,801,331	0.9%
FY25 (through 02/17/25)	23,288,057	11,031,381	822,229	11,853,610	1.5%

National 800# Customer Satisfaction % - NGTP Vs CCaaS Vs Medallia

Thicker line indicates higher response volume. Data 12/01/2023 through 02/15/2025.

■ CCaaS   ■ Medallia   ■ NGTP

Date Range
01-Dec-23 to 02-Jan-25
and Null values

84.1%

85.5%

76.6%

83.1%

51.6%

38.7%

December 2023 | January 2024 | February 2024 | March 2024 | April 2024 | May 2024 | June 2024 | July 2024 | August 2024 | September 2024 | October 2024 | November 2024 | December 2024 | January 2025

N8NN Business Improvement Initiatives

- **Agent Desktop (CHIP) Modernization**
  - Beta release 12/2023
  - Gradually increase functionality by workflow
  - Need AI integration
- **Leverage AI and Speech Analytics**
  - Collab with USDS, OAI, and OT
  - Customer experience mapping, analyze agent policies and procedures
  - Use results to improve business processes across the enterprise
- **Improve new hire agent training**
  - Blended learning model that includes interactive instruction, real-job simulations, and live call handling experiences
  - Rolled out in 3 phases throughout calendar year 2024
  - Each phase replaced portions of the existing content with the redesigned material
  - Fully redesigned course delivered November 4, 2024
- **Re-establish Quality Business Reviews**
  - Bi-Monthly regular deep-dive reviews with each region
  - Focused on TSC site performance on key metrics
- **Improve Supervisor Coaching**
  - Completed December 2024, partnered with ICMI, an industry leader in call-center training
  - Supervisors developed critical agent coaching skills to drive performance improvements

N8NN Business Improvement Initiatives

- **Reintroduction of Agent Scorecards**

    - Completed December 2024, partnered with ICMI, an industry leader in call-center training

    - Supervisors developed critical agent coaching skills to drive performance improvements

- **Centralized Workforce Management**

    - Enterprise real-time agent monitoring, agent scheduling and, optimizing off-phone activities

    - Phased approach aligned with implementing agent schedules in AWS

        - Current Phase- (Evaluation)

            - Enterprise Real-Time monitoring of agents on high-level days

        - Planning Phase

            - Enterprise Real-Time monitoring of agents on all workdays

            - Scheduling, Approving, and Monitoring of large-scale off-phone activities

            - Establishing and Maintenance of Agent Schedules

Keys to Improving 800# Service

- **Integrate AI in call center technology to reduce calls to agents**

- **Integrate AI in Agent tools (TED)**

- **Maximize use of AI analytics of call transcripts to target Agency-Wide improvements and reduce calls**

- **Accelerate deployment of AWS Connect to other business units**

- **Utilize IVR to improve critical service areas:**

    - Leverage ICTU Call flow process as a model

- **Escalate need for cooperation/collaboration to deploy countermeasures to bad actors**

    - Suspected Fraud calls (particularly DD)

    - Robo-dialers

- **Improve Agent productivity through Centralized Workforce management and improved tools**

    - Implement Centralized Workforce management plan

    - Improve AWS WFM tools

# Forecast with Lower Call Volume

Call Volume Impact On ASA

Network Calls Received	ASA (min.)	Queue Wait (min.)
69M	10.9	46.4
72M	11.7	49.1
75M	13.0	54.0
78M	14.5	59.2
81M	16.0	64.2
84M	17.2	67.9
87M	18.3	71.6

NCR vs. ASA & Queue Wait Time
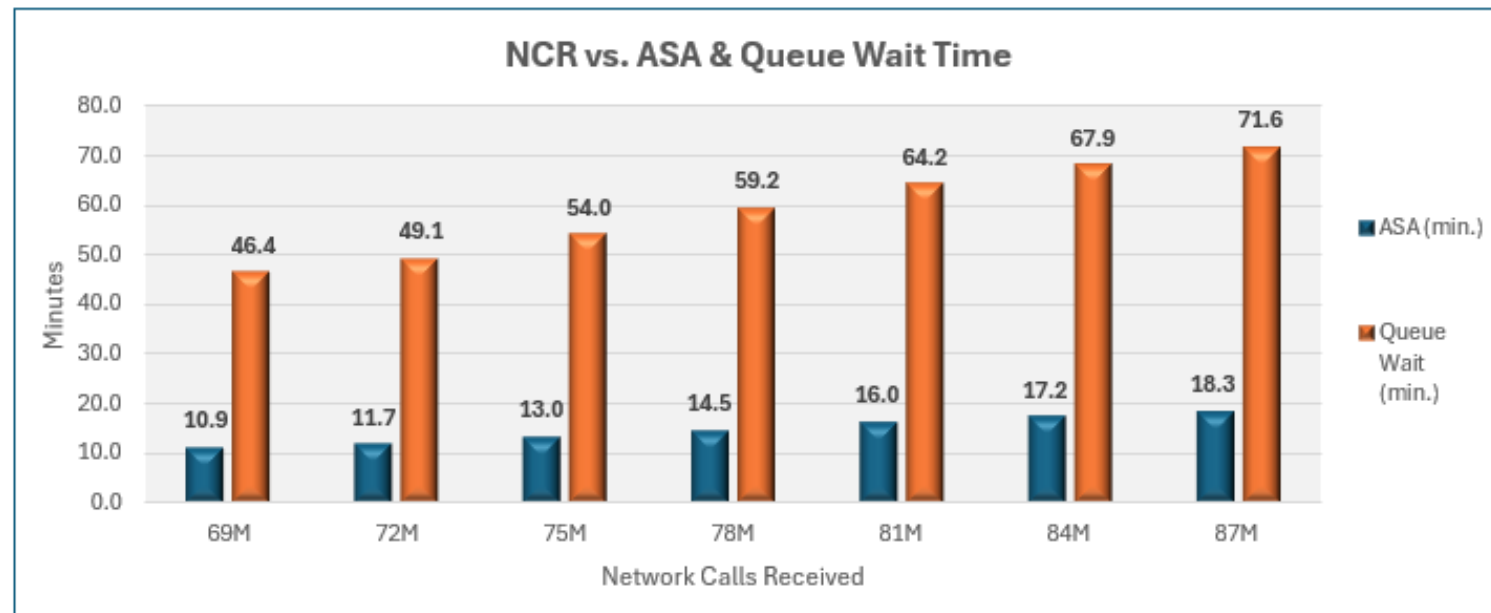
Forecast with Additional Automation

Automation Impact

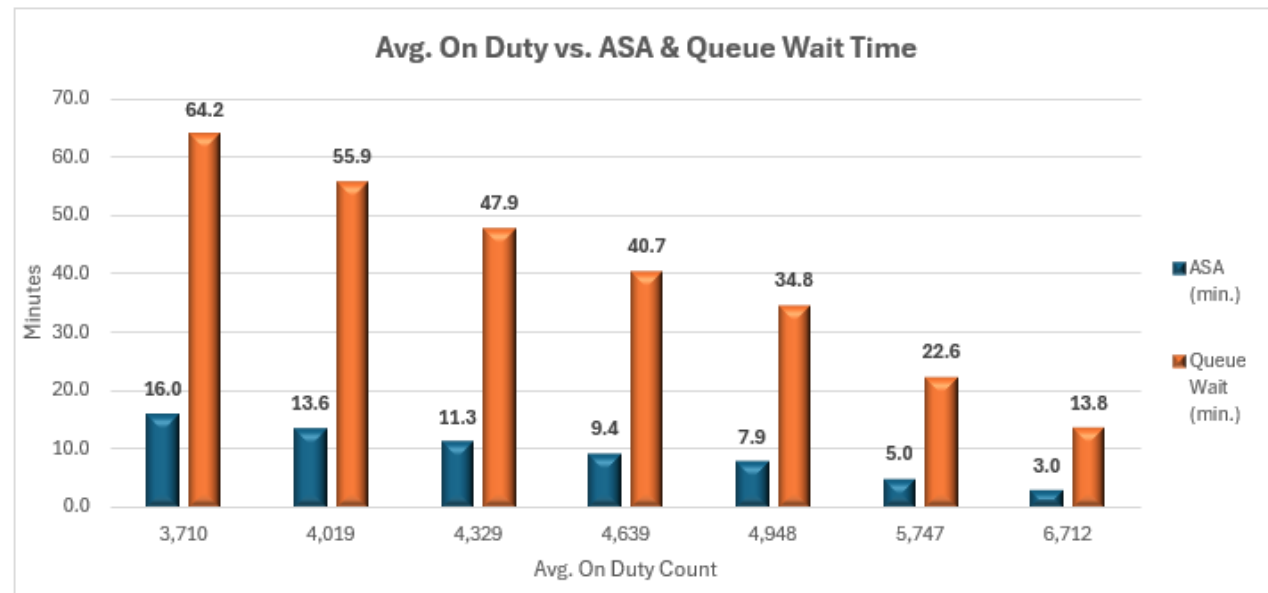| Network Calls Received	Agent Calls Handled	Calls Handled By Automation	Total Calls Handled	ASA (min.)	Queue Wait (min.)
81,000,000	31,000,000	4M	35,000,000	16.0	64.2
81,000,000	31,000,000	7M	38,000,000	14.5	59.2
81,000,000	31,000,000	10M	41,000,000	13.0	54.0
81,000,000	31,000,000	13M	44,000,000	11.7	49.1
81,000,000	31,000,000	16M	47,000,000	10.9	46.4
81,000,000	31,000,000	19M	50,000,000	9.7	41.6
81,000,000	31,000,000	22M	53,000,000	8.4	36.6
81,000,000	31,000,000	25M	56,000,000	7.1	31.6

Automation Calls Handled vs. ASA & Queue Wait Time
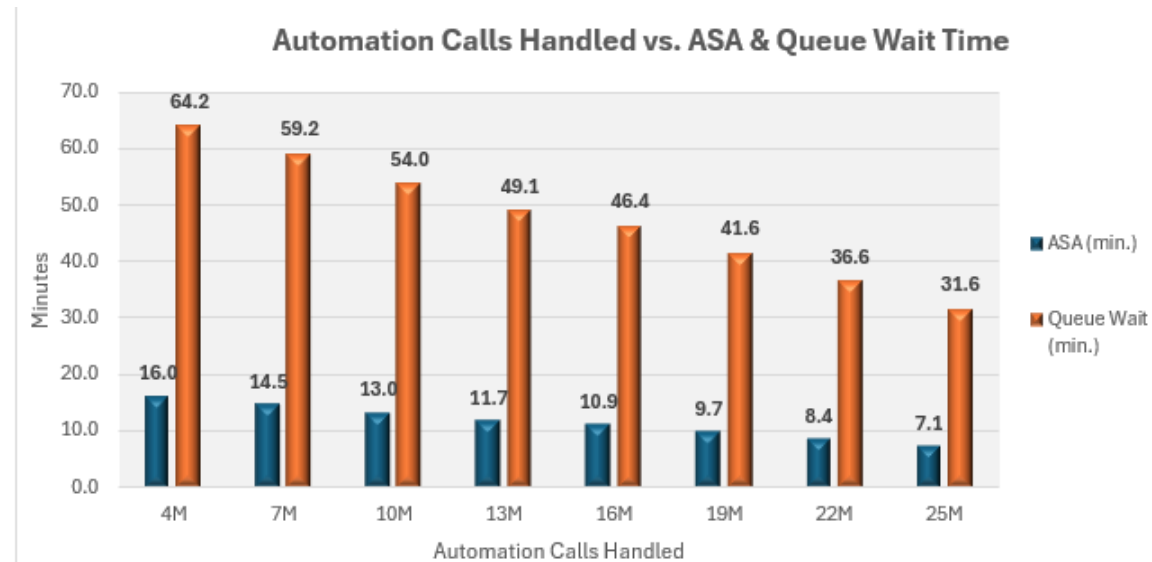
Forecast with Additional Staff

Staff Impact

Network Calls Received	Agent Calls Handled	Avg. On Duty Count	ASA (min.)	Queue Wait (min.)
81,000,000	31,000,000	3,710	16.0	64.2
81,000,000	33,500,000	4,019	13.6	55.9
81,000,000	36,000,000	4,329	11.3	47.9
81,000,000	38,400,000	4,639	9.4	40.7
81,000,000	40,800,000	4,948	7.9	34.8
81,000,000	46,047,456	5,747	5.0	22.6
81,000,000	48,728,755	6,712	3.0	13.8

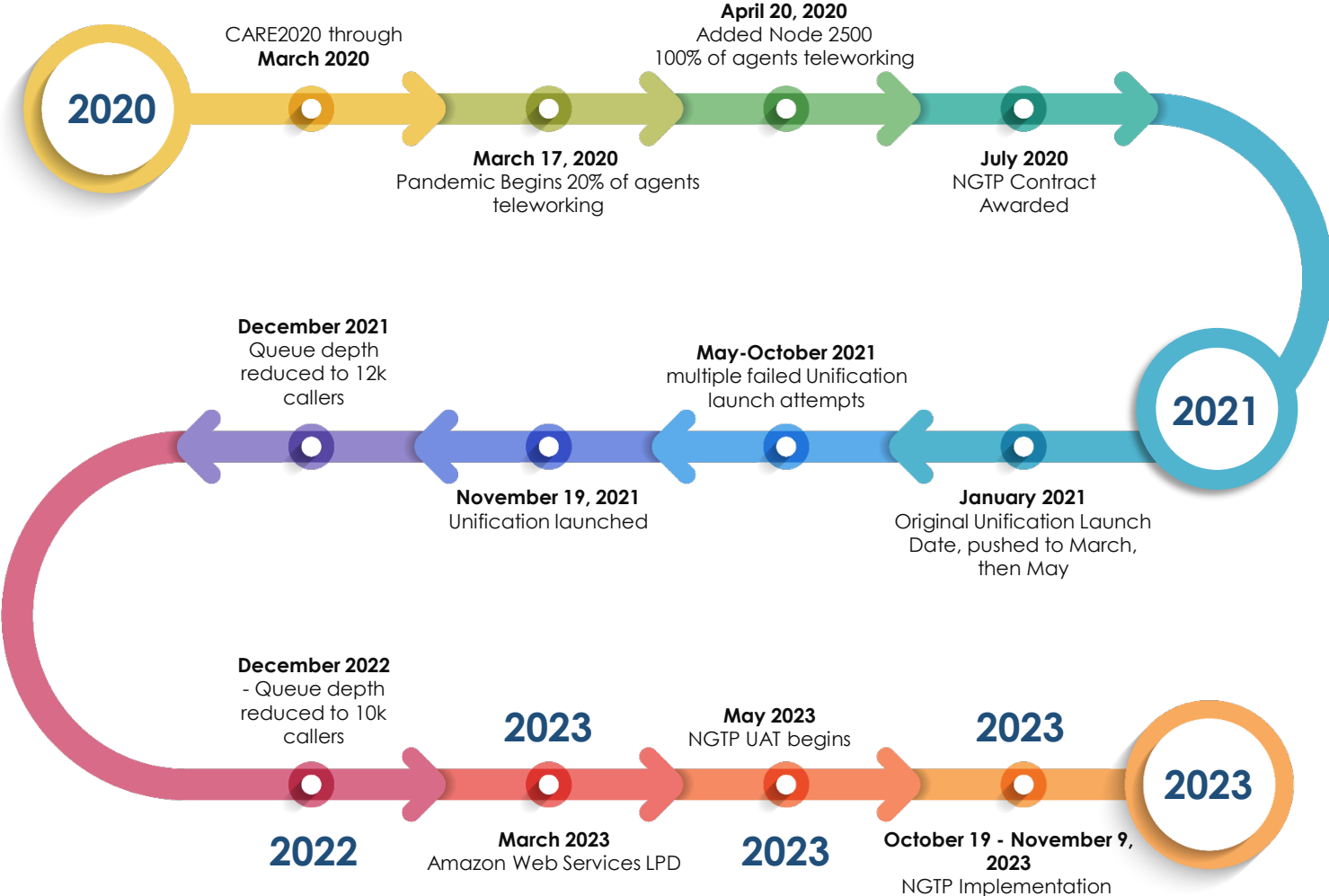* Avg. On Duty Count assumes all journeyman staff

Avg. On Duty vs. ASA & Queue Wait Time

Forecast with More Staff Hours Dedicated to N8NN

Staff Impact

Network Calls Received	Agent Calls Handled	Avg. On Duty Count	RSF	ASA (min.)	Queue Wait (min.)
81,000,000	29,730,823	3,710	55.0%	17.3	68.4
81,000,000	31,000,000	3,710	57.0%	16.0	64.2
81,000,000	32,235,930	3,710	59.0%	14.6	59.5
81,000,000	33,487,407	3,710	61.0%	13.4	55.4
81,000,000	34,740,970	3,710	63.0%	12.3	51.4
81,000,000	35,995,230	3,710	65.0%	11.2	47.4

RSF vs. ASA & Queue Wait Time

Appendix

2020

CARE2020 through
March 2020

April 20, 2020
Added Node 2500
100% of agents teleworking

March 17, 2020
Pandemic Begins 20% of agents teleworking

July 2020
NGTP Contract Awarded

2021

December 2021
Queue depth reduced to 12k callers

May-October 2021
multiple failed Unification launch attempts

November 19, 2021
Unification launched

January 2021
Original Unification Launch Date, pushed to March, then May

December 2022
- Queue depth reduced to 10k callers

2023

May 2023
NGTP UAT begins

2023

2023

2022

March 2023
Amazon Web Services LPD

2023

October 19 - November 9, 2023
NGTP Implementation

From **March 2020 - October 2023**, the 800-Number operated without the following tools, typical of call centers:

- *Limited Workforce Management Feature*

- *Estimated Wait Time*

- *Post Call Survey for Customer Satisfaction Data*

- *Limited MI*

- *Scorecards*

- *Call Back Feature (deployed 12/19/23)*

Appendix

Next Generation Telephony Project (NGTP)

- Cutovers began on 10/19/2023 at 25% intervals with final cutover on 11/9

- Queue capacity: 18k callers

- Call Back Feature to be deployed 12/19/2023

- Agents: 4000+

- NON-508 Compliant

- Automated Transactions Available

- Workforce Management Available

Appointment-Focused Service

Appointment-Focused Service

AFS Progression

COSS Saul Idea → Pandemic 2020 → Re-Entry April 2022 → Atlanta Enumeration Pilot June 2024 → AFS Transition Period Nov - Dec 2024 → Full Implementation Jan 2025

Appointment-Focused Service

AFS Business Process

| Digital First | Resolution at First Contact | Scheduled Appointments | Same Day Service for Special Situations |

Appointment-Focused Service

Communication

	Internal Guidance

	Field Office Signage

	Online Information

	Outreach

Appointment-Focused Service

Electronic Services

FY 2025 National Electronic Services Usage

Transactions

Month	Transactions
Oct-24	3,958,070
Nov-24	4,465,312
Dec-24	4,688,744
Jan-25	5,933,533
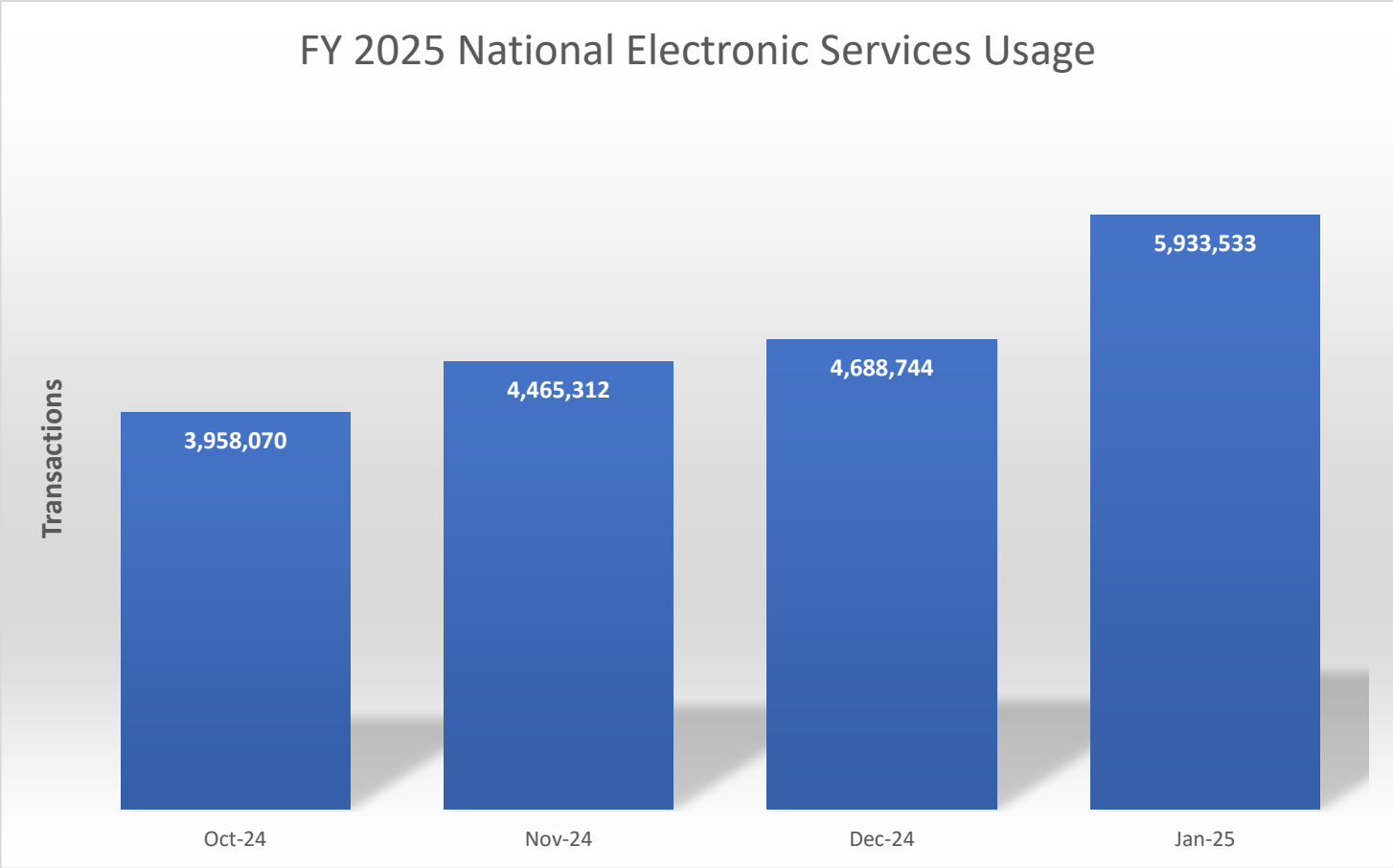
Appointment-Focused Service

Field Office Walk-Ins & Appointments

	OCT-24	NOV-24	DEC-24	JAN-25
PHONE APPT COUNT	505,359	655,494	520,789	649,306
OFFICE APPT COUNT	207,260	416,393	525,007	765,044
WALK-IN COUNT	2,034,969	2,088,186	1,398,130	1,635,515

Legend: ■ WALK-IN COUNT ■ OFFICE APPT COUNT ■ PHONE APPT COUNT
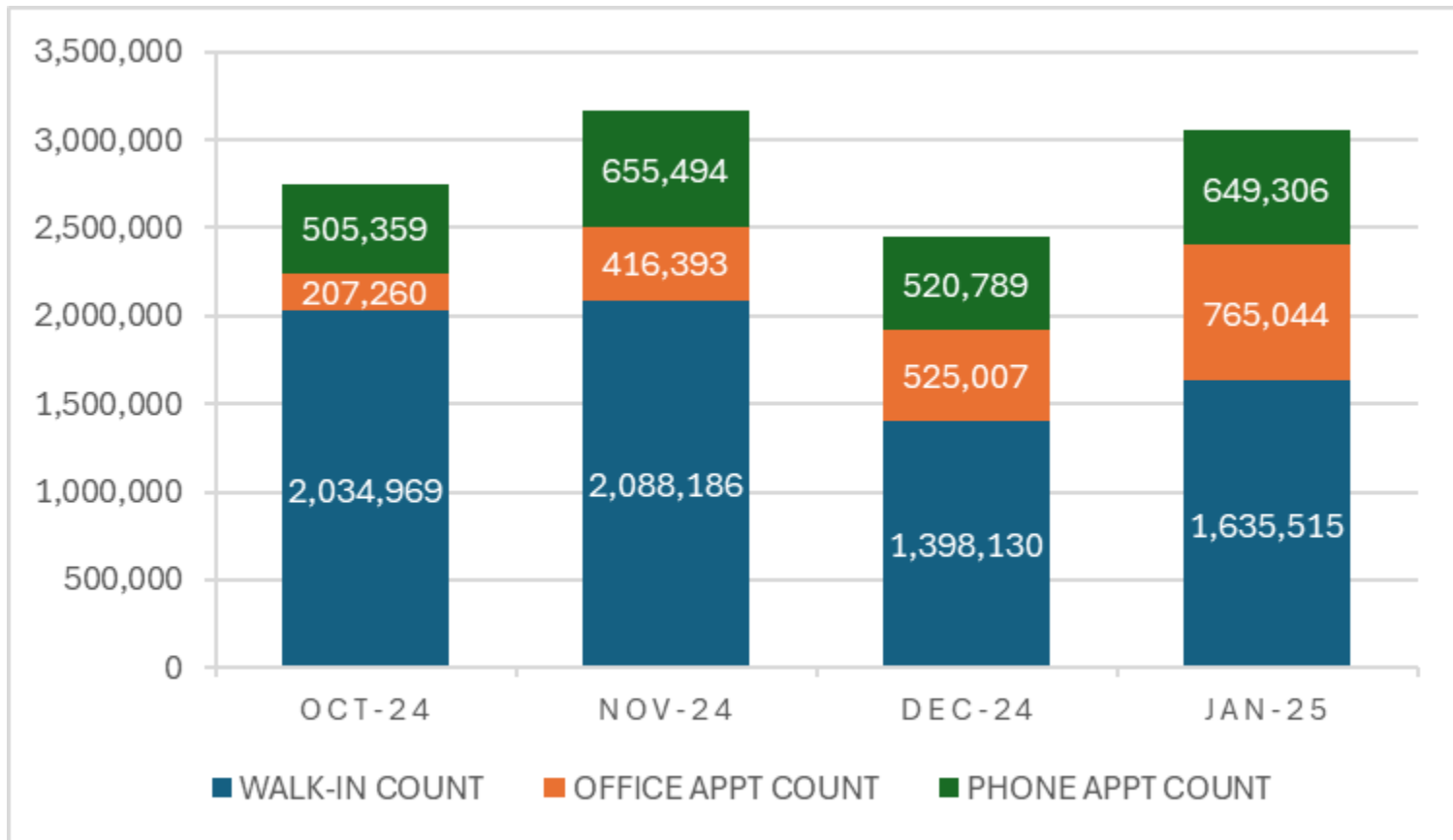
Appointment-Focused Service

Overall Wait Time
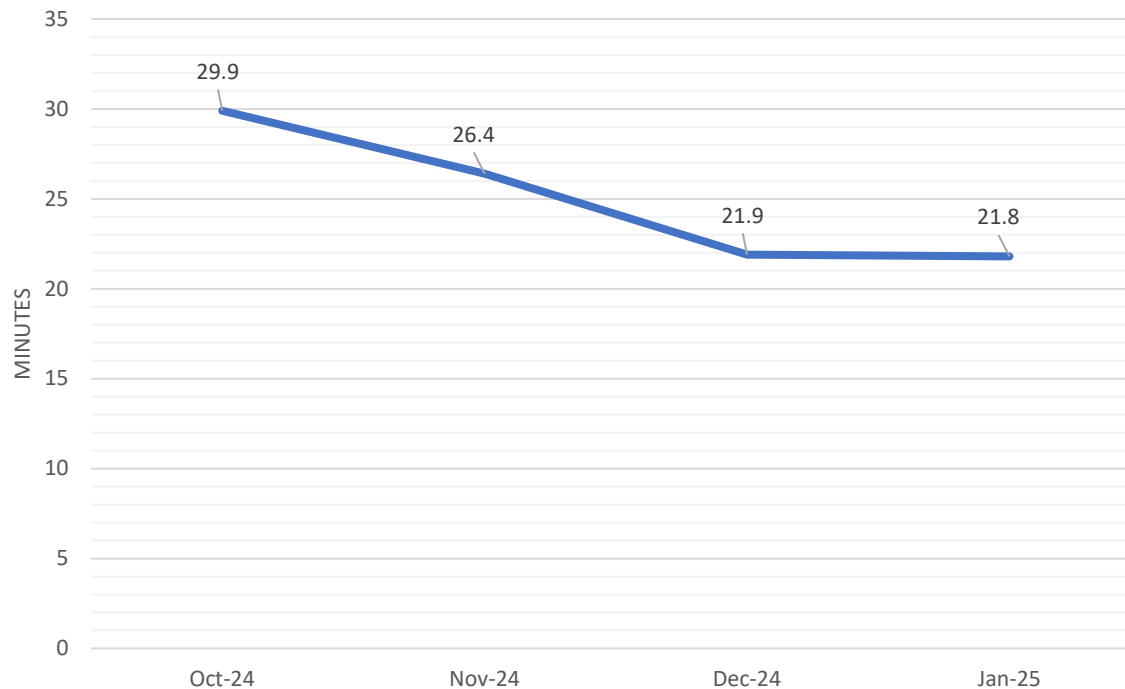
October 2024 through January 2025
8.1-minute (27 percent) decrease

Appointment-Focused Service

Customer Feedback for January 2025

- ➢ **84 percent** satisfaction rate from Field Office visitors.

- ➢ **89 percent** satisfaction rate from Social Security Card Center visitors.

Social Security Fairness Act

Social Security Fairness Act

- Signed into law January 5, 2025.

- Eliminates the Windfall Elimination Provision (WEP) and the Government Pension Offset (GPO) for benefits payable for months after December 2023.

  - The last month that WEP or GPO will apply is December 2023.

  - WEP or GPO no longer apply to benefits starting in January 2024.

  - Benefits are paid the month after they are due; therefore, the January 2024 benefit was received by beneficiaries in February 2024.

Social Security Fairness Act

- Overview of Key Actions Needed to Fully Implement:
    - Process new, initial claims for people who receive a pension based on work that was not covered by Social Security and not apply WEP or GPO.
    - Adjust the benefits for the 3.2 million beneficiaries currently impacted by WEP and/or GPO to remove the offsets retroactively and prospectively.
    - Revise, remove, or update language related to the WEP and GPO agencywide on webpages, publications, notices, forms, the *Social Security Statement*, and application screens.
    - Publish conforming regulations to repeal the WEP and GPO effective January 2024.

Social Security Fairness Act

- Implementation Steps Completed To Date:
  - Added upfront messaging on National 800 Number
  - Released and continue to update Social Security Fairness Act Webpage
  - Released and continue to update Emergency Message with technician instructions on processing initial claims
  - Specialized Workload Support Units (WSUs) began taking claims through the National 800 Number on January 24
  - Significant progress made to support the automation of SSFA for the 3.2 million Title II records that have existing WEP/GPO involvement
  - Briefed OMB and Congressional Staff
  - Three Congressional Priority Correspondence (CPC)

Social Security Fairness Act

- Implementation Next Steps:
  - Begin processing cases with WEP/GPO involvement that are pending in the Processing Centers (PCs)
  - Release notice software
  - Release automation software
  - Conduct negotiations with the Government Publishing Office (GPO) for the notice volume increases from automation
  - Internal and external communications leading to the automation run start date
  - Automation Rollout Schedule will adjust benefits for many of the 3.2M beneficiaries impacted by WEP and/or GPO
  - Manually process the automation fallout and cases that could not be run through automation

Office	Questions/Actions
Operations* Please also see questions/actions at the end related to phone services	Q: How many customers do we serve in the field offices every year?
	Q: What is the status of the Enterprise Contact Center?
	Action: Provide plan for outreach to other agencies to collaborate on digitizing the mail.
	Action: Provide plan for reducing burden to customers related to SSN cards.
OHO	Action: Provide timeline for hearing transcript real-time speech-to-text.
	Action: Provide decision memo on terminating leases for permanent remote sites, including strategic messaging
	Action: Provide timeline to revisit MOU for efficiencies in ALJ scheduling
OGC	Action: Provide ACOSS and DOGE Team with a full ethics briefing, including disclosure of financial interest.
	Action: Provide legal analysis of the inherently governmental work with respect to the 800 Number agents.
	Action: Provide legal analysis of agency's obligation to conduct non-core workloads (e.g., processing Medicare applications).
OBFM	Q: How much are we owed in debts?
OHR	Action: Provide plan and timeline for moving OHR IT-related staff to OCIO.
	Action: Provide outcomes of EEO complaint dispositions, including number of allegations, wins and losses.
ORDP	Action: Provide one-pager status on eVerify.
	Action: Provide updated plan for 21st century Policy Net, including commercial-off-the-shelf options.
OLCA	Action: Provide plan and timeline to increase our outreach on the Hill.
Telephone Strategy	Action: Provide detailed plan and timeline for fixing our telephone systems.
	Q: What are the total costs of the AWS model, including pay per minute?
	Action: Provide data benchmarking our teleservices to that of private industry.