



ACTION PLAN

Social Security Administration
2024

TABLE OF CONTENTS

1: Improve the Employee Experience By Streamlining Technician Tools and Processes	7
2: Improve Employee Engagement (e.g., Transparent Communications, FEVS, WLB, Employee Recognition)	8
3: Improve Recruiting, Hiring, and Onboarding to Energize the Workforce	9
4: Strengthen Training to Better Equip Our Workforce	9
5: Enhance 1-800 Tech, Processes, and Policies to Streamline Call Intake and Improve Customer and Employee Experience	10
6: Enhance the Online Experience and Integrate Third-party Tools, Saving Time and Reducing Pain Points for Customers and Employees (e.g., Wage Reporting App)	12
7: Improve Benefits Intake and Processing for Customers and Employees (e.g., online application all benefits, offline modes, SSI simplification)	14
8: To Reduce the Long Wait Times for Disability Cases, Improve and Implement Disability Systems, Communications, Processes, and Policies	15
9: Expand Digital Submission Channels and Processes (e.g., Forms, Applications, Documents, and Evidence)	16
10: Encourage Self-serve Utilization of Certain Services That Can Be Performed Online (e.g., SSN Card Requests)	17
11: Optimize Internal Processes (e.g., Policy Unification/Rationalization, Enhance Correspondence Handling, Data Sharing Agreement Centralization, etc.)	17
12: Reduce Occurrence of Overpayments/Underpayments by Simplifying Policies and Processes and Automating Systems	18
13: Enhance Inbound and Outbound Payment Capabilities	19
14: Expand and Improve Communication Methods and Channels to Improve Customer Service	19
15: Improve Notice Practices: Format, Plain Language, Systems, Flexibility, Accessibility, Speed, and Cost of Production	21
16: Increase e-Signature Availability and Reduce Unnecessary Signature Requirements	21
17: Harmonize Policies, Communications, and Processes with CMS and Other Government Agencies	22

TABLE OF CONTENTS

18: Improve Usage of Data Analytics Across SSA with Better Governance and Common Standards	23
19: Implement Equity Action Plan and Address Underpayments.....	23
20: Implement FY 2024 Tribal Action Plan Recommendations	25
21: Expand Access to Non-English Language Services and Forms to Improve Customer Experience and Reduce Workloads	26
22: Enhance Outreach and Services to Children In Need	27
23: Simplify SSI Program by Implementing In-Kind Support and Maintenance (ISM) Reforms:	28
24: Speed Adjudication Times by Publishing and Implementing Manner of Appearance Final Rule	29
25: Reduce Delays and Cost of Paying Claimant Representatives by Publishing and Implementing Marasco Final Rule	29
26: Reduce Disability Backlog by Implementing Past Relevant Work Final Rule....	29
27: Reduce the Occurrence of Overpayments by Publishing and Implementing Payroll Information Exchange (PIE) Final Rule.....	29
Appendix A: Acronyms List	31



Dear Colleagues:

It is my pleasure to share with you our 2024 Social Security Action Plan.

Built upon the ideas of frontline Social Security Administration workers from across the country, our Action Plan lays out SSA's top priorities for the remainder of 2024 and points to the road beyond. This document is now posted on SSA's public facing website so every citizen can see, understand, and follow our progress.

Our Action Plan was the product of over 5,000 recommendations offered by employees from the frontlines to the Regional Headquarters, as well as from a range of other internal and external stakeholders. After a thorough review of everyone's feedback, we boiled down the most impactful things we could accomplish into 18 Quick Wins and 158 Leading Actions¹ — all aligned to 27 Strategic Initiatives. Action on each of the Initiatives has already begun; many will take more than just the year to fully accomplish. These efforts will require important investments, including enactment of the President's FY25 budget request for the Social Security Administration.

Openness, transparency, and collaboration are how we developed and refined our Plan. And openness, transparency, and collaboration are how we will get these things done for the American people. But no single component can deliver on these Strategic Initiatives by themselves; therefore, I have empowered and strengthened the Office of Transformation to support, coordinate, and track our progress across the whole enterprise of our agency.

To all of you who put forward your ideas and suggestions — thank you. I see the work you are doing as I continue to travel across our country. Your caring and compassionate work inspires me every day. America is counting on us. And I'm honored and grateful to be engaged in this great work with each of you.

Stronger Together.

Martin O'Malley
Commissioner

¹ Initiative=Grouping of Leading Actions and Quick Wins; Leading Action=Sub-initiative (i.e., project) lasting 3+ months from this document's release; Quick Win=Sub-initiative (i.e., project) lasting ≤3 months from this document's release.

Alignment of Action Plan Initiatives to Top Commissioner Priorities:

#	Initiative Title	National 800 Number	Disability Determinations	Overpayments and Underpayments	Investing In Our Workforce	Program Simplifications with Process and Technology Enhancements
1	Improve the Employee Experience By Streamlining Technician Tools and Processes					
2	Improve Employee Engagement (e.g., Transparent Communications, FEVS, WLB, Employee Recognition)					
3	Improve Recruiting, Hiring, and Onboarding to Energize the Workforce					
4	Strengthen Training to Better Equip Our Workforce					
5	Enhance 1-800 Tech, Processes, and Policies to Streamline Call Intake and Improve Customer and Employee Experience					
6	Enhance The Online Experience and Integrate Third-party Tools, Saving Time and Reducing Pain Points for Customers and Employees (e.g., Wage Reporting App)					

#	Initiative Title	National 800 Number	Disability Determinations	Overpayments and Underpayments	Investing In Our Workforce	Program Simplifications with Process and Technology Enhancements
7	Improve Benefits Intake and Processing for Customers and Employees (e.g., online application all benefits, offline modes, SSI simplification)					
8	To Reduce the Long Wait Times for Disability Cases, Improve and Implement Disability Systems, Communications, Processes, and Policies					
9	Expand Digital Submission Channels and Processes (e.g., Forms, Applications, Documents, and Evidence)					
10	Encourage Self-serve Utilization of Certain Services That Can Be Performed Online (e.g., SSN Card Requests)					
11	Optimize Internal Processes (e.g., Policy Unification/Rationalization, Enhance Correspondence Handling, Data Sharing Agreement Centralization, etc.)					

#	Initiative Title	National 800 Number	Disability Determinations	Overpayments and Underpayments	Investing In Our Workforce	Program Simplifications with Process and Technology Enhancements
12	Reduce Occurrence of Overpayments/ Underpayments by Simplifying Policies and Processes and Automating Systems					
13	Enhance Inbound and Outbound Payment Capabilities					
14	Expand and Improve Communication Methods and Channels to Improve Customer Service					
15	Improve Notice Practices: Format, Plain Language, Systems, Flexibility, Accessibility, Speed, and Cost of Production					
16	Increase e-Signature Availability and Reduce Unnecessary Signature Requirements					
17	Harmonize Policies, Communications, and Processes with CMS and Other Government Agencies					
18	Improve Usage of Data Analytics Across SSA with Better Governance and Common Standards					
19	Implement Equity Action Plan and Address Underpayments Backlog					

#	Initiative Title	National 800 Number	Disability Determinations	Overpayments and Underpayments	Investing In Our Workforce	Program Simplifications with Process and Technology Enhancements
20	Implement FY 2024 Tribal Action Plan Recommendations					
21	Expand Access to Non-English Language Services and Forms to Improve Customer Experience and Reduce Workloads					
22	Enhance Outreach and Services to Children In Need					
23	Simplify SSI Program by Implementing In-Kind Support and Maintenance (ISM) Reforms: <ul style="list-style-type: none"> •Rental Subsidy Final Rule •Definition of a Public Assistance Household Final Rule •Omitting Food from ISM Calculations Final Rule 					
24	Speed Adjudication Times by Publishing and Implementing Manner of Appearance Final Rule					
25	Reduce Delays and Cost of Paying Claimant Representatives by Publishing and Implementing Marasco Final Rule					

#	Initiative Title	National 800 Number	Disability Determinations	Overpayments and Underpayments	Investing In Our Workforce	Program Simplifications with Process and Technology Enhancements
26	Implement Past Relevant Work Final Rule					
27	Reduce the Occurrence of Overpayments by Publishing and Implementing Payroll Information Exchange (PIE) Final Rule					

1: Improve the Employee Experience By Streamlining Technician Tools and Processes

Quick Wins/ Leading Actions:

- Improve SSA's Customer Relationship Management (CRM) System through the following enhancements:
 - Enable data propagation to and from the CRM to other applications to ensure updates such as change of address, direct deposit, and contact preferences are reflected in all applicable systems.
 - Implement enhanced connectivity and integration with other systems (e.g., VIPr, CCE, MCS, SSNAP, WAC, etc.).
 - Link incoming calls and information provided using Interactive Voice Response (IVR) (e.g., Screen Pop).
 - Implement Customer Decision Hub (CDH) capability to assist technicians with identifying the next best action based on customer and agency needs.
- Improve Workload Management Tools:
 - Display all pending tasks and requests for information based on user roles in one place, allowing technicians to follow up on outstanding issues (manually or automatically) without needing to go to individual applications; includes functionality for automatic assignment of cases and the ability to see the full workload queue from one location.
 - Leverage other workload management and sharing tools, such as the SDF PIN attribute, to facilitate workload portability.
 - Fully integrate WAC within proposed and developing workload management solutions.
- Enhance artificial intelligence (AI) functionality to support workflows and workload management in the CRM:
 - Implement 21st Century PolicyNet with enhanced AI search capabilities.
 - Implement AI supported workflows, prompted scripts for interviews, navigation support with complex policy topics, and workload processing.
- Fully implement adjudication day concept following current pilot underway in 10 field offices (if pilot shows improved productivity).

Accomplishments:

- More automation:
 - SSA has implemented Automated Medicare Process (AMP) for back-end processing of online Medicare claims. AMP will reduce processing time from 7 minutes to 7 seconds, freeing up the equivalent of around 40 people in Workload Support Units for other critical tasks.
 - During one of Commissioner O'Malley's regional visits, an employee in Boston identified the need for a simple technology fix to create a "no to all" button (similar to "select all") within the claims-taking process on SSI applications. The "no-to-all" button saves employees and customers time during the application process. SSA implemented this fix within 4 weeks.

- SSA is increasing use of Intelligent Medical Language Analysis Generation, or IMAGEN. The tool helps employees complete disability determinations by identifying and organizing evidence and allowing employees to input notes within the evidence. In February, we rolled out IMAGEN to Disability Determination Services (DDSs) for use with Continuing Disability Reviews.
- To help reduce duplicative 1696 Forms and the number of calls to local offices, enhancements to the Appointed Representative System were implemented in January and June, which allow appointed representatives and advocates to see which SSA-1696 Forms they submitted have been processed as well as information regarding claims status.
- Technician Experience Dashboard (TED):
 - SSA completed the rollout of TED, its CRM platform, to all field offices and Workload Support Units; TED improves the technician experience by providing a holistic customer view, transaction history, and modernized path for inputs, saving time and improving accuracy for customer interactions.

2: Improve Employee Engagement (e.g., Transparent Communications, FEVS, WLB, Employee Recognition)

Quick Wins/ Leading Actions:

- Implement ongoing management training focused on communicating better with staff (i.e., soft skills), developing their employee's careers, and fairly evaluating performance.
- Hold agency leadership accountable for employee engagement by updating and tracking component level Improving Workplace Morale plans.
- Implement an Employee Engagement Community of Practice for supervisors and employees to share best practices, research, and innovative ideas. (Quick Win)
- Analyze additional opportunities to recognize employees' efforts and contributions.

Accomplishments:

- Improved overall Federal Employee Viewpoint Survey (FEVS) response rate through a targeted communication and marketing strategy, leading to the highest agency-wide participation rate since 2012.
- Increased onsite presence for approximately 6,000 headquarters and regional employees (Employees in local offices increased their onsite presence starting in April 2022):
 - This change brought SSA into alignment with other federal agencies across government who have been increasing their own onsite presence and increases opportunities for collaboration, engagement, and innovation.
 - The Commissioner also made use of the fitness centers in headquarters and regions available to all employees at no cost to help improve employee wellness and morale. Since implementing this change, over 2,250 employees have taken advantage of this service.
- Commissioner O'Malley, through SSA's Office of Labor-Management and Employee Relations, has generated a more open line of dialogue between Management and Labor. Regular discussions have prompted the implementation of improvements for employee work-life balance, such as the American Federation of Government Employees (AFGE) Episodic Telework Memorandum of Understanding, swift rollout of the Automated Medicare Process, improvements in the use of Common Calendar, and more.

- New Union Management Cooperation Councils (UMCCs) – which the Special Advisor to the Federal Labor Relations Authority described as being at the forefront of Union-Management collaboration – are engaged in productive and specific pre-decisional discussions between AFGE and SSA management on a variety of topics including improvements to new-hire training, which has been a key area for improvement towards retention of staff.
- Monthly Labor Roundtables and the UMCC provide regular opportunities to maintain an open dialogue between Labor and Management at all levels of SSA, which improves employee morale and efficiency.

3: Improve Recruiting, Hiring, and Onboarding to Energize the Workforce

Quick Wins/ Leading Actions:

- Hold comprehensive welcome and onboarding days for new staff cohorts.
- Enhance the Onboarding Checklist, to include Commissioner of Social Security (COSS) video message, training, and reduced redundancies. (Quick Win)
- Implement multi-pronged pilot initiative for engaging TSC new hires including targeted videos and cohort tracking to improve retention.
- Develop recruitment resources. (Quick Win)
- Establish an Employee Experience workgroup to evaluate and improve the onboarding experience, including communications and processes. (Quick Win)

Accomplishments:

- The 2024 funding level of \$14.277 billion enabled Commissioner O’Malley to lift the agency-wide hiring freeze and approve 1,600 critical hires for the teleservice centers (TSCs). We also authorized 1,290 field office hires, 600 hires for the State disability determination services, and 300 hires for our hearing offices.
- New agency policy for Domestic Employees Teleworking Overseas (DETO): On January 17, 2024, SSA published a new DETO policy in alignment with Section 6202 of the Fiscal Year 2022 National Defense Authorization Act (Public Law 117–81, December 27, 2021) to better support military spouse employees by permitting them to temporarily perform their duties from approved overseas locations.

4: Strengthen Training to Better Equip Our Workforce

Quick Wins/ Leading Actions:

- Create career pathway documentation to assist staff with understanding career mobility options, particularly for GS-1 through GS-10 employees.
- Enhance Field Office (FO) and Workload Support Unit (WSU) entry-level training to incorporate more live interactions between trainees and trainers, or onsite mentors.
- Develop refresher training for journey-level technicians in field offices, teleservice centers, workload support units, and processing centers. This would include providing refresher training to employees that have been on detail and are returning to their permanent position of record after a year or more. Develop additional “Policy in Focus” topic areas to ensure technicians are aware of programmatic or other technical topics.

- Improve training content, including through the use of live instruction mixed with an appropriate amount of self-paced instruction, workload-targeted on-the-job training (OJT), and mentorship so that it's more consistent across the nation; dedicate more employees to full time training and provide mentors with sufficient time to work with trainees (mentors could be assigned from the same office as mentees).
- Enhance communication and feedback about why candidates were not selected for the National Leadership Development Program (NLDP) program. This could include providing more information to candidates about timelines, scores, rating scales, and feedback on so they can improve their applications in the future.

Accomplishments:

- SSA provides continuing education opportunities including:
 - Virtual classes on the topic of "Problem Solving" for GS-11 and below employees, increasing bench strength and skill for SSA. In fiscal year 2024, SSA provided over 900 employees with resources for problem solving by hosting a flash mentoring event and several classes. SSA plans to continue these efforts by hosting more classes.
 - eLearning programs for customer-facing employees.
 - New opportunity for GS-7 through GS-11 employees to attend "Preparing to Lead" training program offered by the Partnership for Public Service. In fiscal year 2024, SSA selected 24 employees to participate in the summer/fall training program. SSA plans to continue these efforts as additional sessions are offered.
 - Launched new National Leadership Development Program (NLDP) on 7/16/2024 which is open to all GS-8 to GS-11 or wage grade equivalent employees.
- SSA continues to improve processes to report potential fraud and to train our employees on fraud identification and prevention.

5: Enhance 1-800 Tech, Processes, and Policies to Streamline Call Intake and Improve Customer and Employee Experience

Quick Wins/ Leading Actions:

- Update Customer Relationship Management (CRM) capabilities to better manage customer data and improve call resolution.
- Update 1-800 technology and systems to streamline call intake and improve customer experience.
- Implement SSN propagation from the IVR to CHIP/TED and other systems ("screen pop"). (Quick Win)
- Replicate OCO's Representative call center (RCC) in all PCs to support a larger volume of attorney and authorized representative inquiries and publicize number more broadly. (Quick Win)
- Update TSC guidance in the Customer Help and Information Program (CHIP) to reflect current processing times resulting in fewer phone inquiries. (Quick Win)
- Work with vendor to change caller ID display for outgoing calls to reduce or eliminate public perception that calls from SSA may be SPAM or fraudulent.
- Enhance our phone systems by:
 - Fixing call connection issues (e.g., dropped calls, delays, cutouts during calls, blocked calls not going through).

- Adding call back feature to automated menu.
- Improving the customer experience by reducing the wait time² to answer the phone on the National 800 Number:
 - By September 30, 2025, achieve an average speed of answer of 12 minutes, including implementation of estimated wait time and call back options.
- Improve TSC mentoring by tracking these activities. Provide targeted training to agents by using actionable feedback.
- Assign TSC supervisors capabilities with a clearer breakdown of typical time allocations to management for various activities and identification of an ideal Share “week in the life” of supervisors to enable guide coaching and other core activities required to improve CSR performance.

Accomplishments:

- Guiding customers to the right place:
 - SSA updated its Program Operations Manual System (POMS) so agency employees are no longer forced to require wet signatures from customers where eSignature options are available. This change gives customers a quicker, more secure way to sign documents and allows SSA to acquire digital signatures to process claims more efficiently. The following POMS have been updated:
 - [SSA - POMS: SI 02305.003 - Alternative Signature Methods: Attestation and Witnessed Signature - 07/01/2024](#)
 - [SSA - POMS: SI 02305.003 - Alternative Signature Methods: Attestation and Witnessed Signature - 07/01/2024](#)
 - [PolicyNet/Instructions Updates/EM-24015: eSignature/Upload Documents – Processing Reminders, Addition of the SSA-827 Webform and 27 New Evidence Types](#)
- SSA explored options to remove wet signature requirements for forms and documents to reduce the customer burden.
- SSA worked with the Centers for Medicare & Medicaid Services (CMS) to remove SSA’s 1-800 Number from many CMS resources and instead point to SSA.gov for more information. This change will improve the customer experience by directing customers to CMS’s 1-800 Number for Medicare issues which SSA 1-800 Number agents are unable to address.
- The 2025 Medicare & You Handbook, which is mailed to about 50 million households, will refer users to appropriate webpages instead of SSA’s 1-800 Number wherever possible. This change will direct customers to our webpages where they will find the information they need faster and easier than calling our 1-800 Number.
- Used multiple strategies to help shorten hold times, leading to a cumulative average speed of answer (ASA) of 30 minutes through the end of July (putting us on track to realize our APG of 32 minute ASA for FY24):
 - SSA updated its phone system to more easily re-route calls to other available agents and offer Call Back Assist (CBA) to more callers.
 - SSA shortened the message customers first hear when they call us.
 - SSA redesigned our training for new TSC hires.

² Wait time is measured by the average speed of answer (ASA), which is measured from the time the call enters the queue to speak to an agent until the call is answered by an agent. It does not include time spent in self-service or the time elapsed between a call-back request and the connection of the callback.

- To help prevent SSA calls from appearing as spam, SSA registered local field office phone numbers so our customers can see that SSA is calling them regarding their claim.
- Providing more accurate estimates of wait times:
 - Notices to millions of customers have been updated to reflect current processing timeframes for disability decisions, which means fewer calls from applicants who used to be given erroneous expectations about when their claim would be processed.

6: Enhance the Online Experience and Integrate Third-party Tools, Saving Time and Reducing Pain Points for Customers and Employees (e.g., Wage Reporting App)

We collect customer feedback using a multi-dimensional approach including inline customer feedback surveys, employee outreach, ongoing engagement with external stakeholders including advocates, appointed representative professional organizations, benchmarking with other federal agencies, and direct customer and employee testing.

We prioritize feedback based on customer focus, business value, and ongoing modernization of our legacy systems and infrastructure. Our FY25 investments focus on three key goals: reducing wait times on our National 800 Number; reducing the disability claims backlog; and eliminating inequities in our administration of overpayment and underpayment workloads.

Quick Wins/ Leading Actions:

- Enhance www.ssa.gov:
 - Use the United States Web Design System (USWDS) to ensure a consistent appearance across public-facing websites.
 - Expand field office search results to present customers adjacent SSA field offices based on zip code searched.
 - Create a decision tree to show customers the most effective service channel based on their inquiry.
- Simplify first party, and third-party ID authentication and authorization to expand digital services:
 - Conduct product discovery on our digital identity program to determine customer needs via customer and usability testing.
 - Conduct market research with other government agencies and private sector organizations to assure we are leveraging best practices and complying with latest iteration of NIST guidelines for authentication and authorization.
 - Balance ease of use with security to ensure the optimal solution is available to our customers yet safeguards our data while offering the opportunity to customers to conduct business with SSA in the manner and at the time of their choosing.
 - Continue to prioritize control improvements that align SSA's digital identity program with emerging guidelines and best practices that position us for strong alignment with the new Digital Identity Guidelines.
- Expand Online Services for Authenticated Individuals:
 - Continue to encourage customers to use online services for simple actions like change of address, direct deposit, and replacement Social Security cards.

- Expand *my* Social Security to include SSI change of address and potential living arrangement changes.
- Integrate upload documents in *my* Social Security and provide a receipt in Message Center confirming the upload.
- Improve Claim Status Tracker to include more detailed statuses for Disability and Appeals phases.
- Include SSI payment history in iBEVE.
- Allow T2 beneficiaries to submit W4V requests online via their *my* Social Security account or through verbal attestation by calling SSA.
- Allow claimants to complete an SSI Redetermination or Limited Issue (LI) online.
- Expand Online Services for Authenticated Third Parties:
 - Launch the online Appeals and Appointed Representative Processing Services (AARPS) portal with representative appointment and fee payment listings.
 - Expand AARPS functions including an online SSA-1696, SSA-1693, and other Business Services Online (BSO) options such as eView and Electronic Records Express (ERE).
 - Improve ability to verify representatives electronically.
 - Incentivize representatives to file SSA-1696 online by processing forms timely and providing SMS and email acknowledgments.
 - Allow representatives to upload documents and allow third-party digital signatures.
 - Provide representatives electronic notification of processing status.
 - Increase the full completion of claims by issuing standards to third-party assistance organizations/representatives on the information needed to adjudicate a disability within existing policy and regulations.
- Implement and Improve Appointment Scheduling:
 - Enable online self-service appointment management including schedule, cancel, reschedule of initial claims appointment by the end of FY 2026.
 - Enable simpler and improved calendar management tool.
 - Enable individual and batch appointment portability across offices/geographic boundaries.
 - Expand Online Services for Authenticated Third Parties.
- Expand Information and Capabilities in Message Center:
 - Implement secure two-way communications between customers and SSA staff.
 - Add death notices to *my* Social Security Message Center.
 - Expand Message Center to support both email and text messages for courtesy notifications to all customers when a new electronic notice or message has been added to their secure inbox.
 - Send confirmation receipts in Message Center to customers and their appointed representatives.
 - Create interoperability with the National Case Processing System for all components (e.g., OHO, DDS, etc.).

7: Improve Benefits Intake and Processing for Customers and Employees (e.g., online application all benefits, offline modes, SSI simplification)

Quick Wins/ Leading Actions:

- Improve the technician-assisted Consolidated Claims Experience (CCE):
 - Learn through listening sessions how we can improve the end-to-end claims intake and adjudication process. This is solely focused on an internal technician-facing application, in which we would receive feedback from our internal employees who utilize the CCE application.
- Improve Benefit Screening:
 - Automate closeout in the Electronic Leads & Appointment System (eLAS) after required follow-ups.
- Expand online application types:
 - Implement online Lump Sum Death Payment (LSDP) applications.
 - Create online application for survivors' benefits.
 - Create online SSI application for children for first- and third-party applicants (e.g., parent filing for child).
 - Redesign the DIB application with eligibility check points, which include providing an intuitive path to unauthenticated applications (i.e., eliminate iClaim exceptions).
 - Require completion of SSA-3368, 8240, and 827 with internet disability applications.
 - Require completion of detailed questions, such as pension receipt, source and dates, when claimants allege receipt of a non-covered pensions, which would save time, mitigate improper payments, and streamline processing.
- Improve Claims Processing:
 - Give one employee in each local field office access to MACADE. This would eliminate the need for A101's, Manager to Managers, MDW's, etc.
 - Eliminate repetitive customer-specific questions required for customer contact and service delivery and manage centrally (e.g., Name, SSN, DOB, Residence, Mail, Contact Information).
 - Eliminate ePath Living Arrangement referrals by expanding online SSI Change of Address (COA) and living arrangement development in *my Social Security* and TED.
- Simplify SSI Policy (see also 23. *Implement ISM Regulations*):
 - Issue an Administrative Message (AM) to clarify that technicians can complete a capability interview via phone when a face-to-face interview isn't practical. Assess whether rules can be expanded to allow for capability interviews via phone without practicability determination.

Accomplishments:

- Centralizing and digitizing mail processing:
 - SSA developed and implemented a small-scale proof of concept in the Philadelphia region to centrally process and digitize mail for 26 local offices. The central mail location is the Wilkes-Barre Direct Operations Center. Central processing helps eliminate backlogs and reduce processing times.

8: To Reduce the Long Wait Times for Disability Cases, Improve and Implement Disability Systems, Communications, Processes, and Policies

Quick Wins/ Leading Actions:

- Enhance IMAGEN to better serve as decision support tool for the disability process.
- Ensure our disability program remains current by considering technical improvements to update our occupational data sources.
- Improve Decision Writer materials by increasing number of templates planned to be created by end of fiscal year.
- Implement enhancements to the National Case Processing System (NCPS) for disability to improve the efficiency within the disability process.
- Implement unified communication capabilities for Disability Determination Services.
- Prioritize completing 2.3 million initial disability determinations by the end of the fiscal year. (Quick Win)
- Explore opportunities to add Health Information Technology (HIT) partners more quickly. (Quick Win)
- Establish and implement the Customer Experience Business Process Pilot, in line with the [2024 CX Delivery Commitment 3: *Improving the process for obtaining adult disability benefits*](#), to improve the customer experience and equity.
- Complete implementation activities to tie future increases in representative fee cap to the annual cost-of-living adjustment (COLA) effective January 2026.

Accomplishments:

- We have increased IMAGEN training, which increased the number of disability examiners who use IMAGEN by 109 percent from the beginning of FY 2024 through July 2024. We introduced the use of IMAGEN at the appeals levels. IMAGEN is a disability decision support tool that facilitates quicker disability decisions.
- We issued two Emergency Messages to employees on June 22, 2024 that provide instructions on updates to the use of occupational data for disability determinations. The first identifies [114 DOT occupations](#) with jobs that exist in very limited numbers, if at all, that will no longer be used to support a “not disabled” finding at the last step in the evaluation process for disability determinations. The second identifies [13 DOT occupations](#) where federal courts have questioned supporting evidence of a “not disabled” finding and describes additional requirements for use of these occupations.
- We restored a pre-2018 policy – allowing technicians in local offices to apply a prior determination of disability. This change, called collateral estoppel, will help reduce duplication and processing times.

- We issued a press release on March 29, 2024, and issued a Federal Register Notice on May 10, 2024 announcing that we will increase the claimant representative fee cap from \$7,200 to \$9,200 effective November 30, 2024 and that we will tie future increases to the annual cost-of-living adjustment. This change will provide an incentive to increase claimant representation, which will help underserved communities, especially those with low incomes, obtain assistance with navigating the disability determination process.
- As of June, SSA has completed 375,000 full medical Continuing Disability Reviews (CDRs). Meeting the National CDR target at the end of June means DDS employees can pivot to processing initial claims. Since reaching the CDR target in June, we've had six consecutive weeks of initial clearances above receipts.

9: Expand Digital Submission Channels and Processes (e.g., Forms, Applications, Documents, and Evidence)

Quick Wins/ Leading Actions:

- Expand digital forms and evidence submissions:
 - Initiate third party online forms.
 - Further assess current policy to determine opportunities to accept electronic signatures without requiring a subsequent verification call.
 - Implement form and evidence submissions as a service to support multiple submission channels (e.g., *my Social Security*, phone).
- Expand data exchanges and enable online verifications:
 - Expand data exchange for legal documents such as divorce decrees and adoption records to reduce name change visits to local offices.
 - Increase electronic exchange agreements to identify evidence of workers' compensation and other third-party data.
- Include additional Upload Document capabilities such as adding new forms available for electronic upload and signature (when a signature is required) and expanding the types of evidence available for electronic upload.
- Offer electronic signature and document upload for customer self-service (currently an SSA technician-initiated process).

Accomplishments:

- In March 2024, SSA launched eSignature and document upload to local offices and Workload Support Units nationwide (about 28,000 employees). Fifty (50) agency forms and seventy-nine (79) evidence types are available for customer electronic signature (when a signature is required) and upload. Customer Experience surveys indicate 86.8% Customer Satisfaction and 87.7% Trust ratings with this service.

10: Encourage Self-serve Utilization of Certain Services That Can Be Performed Online (e.g., SSN Card Requests)

Quick Wins/ Leading Actions:

- Test the use of educational videos to educate the public (in English and Spanish) on required documentation prior to applying for a new or replacement Social Security card. Allow the video to be sharable through text, email, and via various social media platforms.

Accomplishments:

- In line with the [2024 CX Delivery Commitment](#) 1: Expanding the ability to change name online due to marriage to additional states: Thus far in FY24, SSA added Colorado, Virginia, Wisconsin, Delaware, Hawaii, Iowa, and Connecticut to the list of states where customers can update their SSN with a name change due to marriage – without visiting a local office – by using our online replacement Social Security Number card online application process:
 - 21 states now allow applicants to apply online for a replacement SSN card with a name change due to marriage.
 - 47 states now allow applicants to apply online for a simple replacement SSN card.
 - SSA is now on track to add additional states in FY 2025 and expand our online replacement SSN card throughout the country.
- SSA is on track to automate one million more Enumeration Beyond Entry replacement card applications in FY 2024 compared to FY 2023. With this automated process, it also reduces the need for individuals to visit their local SSA office to file an SSN application as well as reduces the strain on our online infrastructure.

11: Optimize Internal Processes (e.g., Policy Unification/Rationalization, Enhance Correspondence Handling, Data Sharing Agreement Centralization, etc.)

Quick Wins/ Leading Actions:

- Nationalize effective workflows and technician tools so that they are accessible to all employees and kept current as policy changes.
- Set up a system to make sure changes to policies and procedures are more accessible in PolicyNet, which will make it easier for our employees to follow policies and procedures.
- Improve the Lump Sum Death Payment process by removing many of the questions and evidence requirements for living in the same household determinations. (Quick Win)
- Change Office of Quality Review (OQR) process to send Assistance Requests (ARs) for work activity to the FO to reduce DDS processing time.
- Explore data exchange agreement with Health and Human Services (HHS) to ensure licensure status of Consultative Examination (CE) providers, which will help improve program integrity by verifying that providers remain qualified to conduct consultative exams.

Accomplishments:

- One May 2, 2024, we issued [EM-24014: Policy Changes and Procedures to Streamline the Development and Documentation for Living in the Same Household \(LISH\) requirement for Lump Sum Death Payments- POMS Updates Will Follow Shortly \(ssa.gov\)](#). These changes make it easier to administer Lump Sum Death Payment (LSDP) application for surviving spouses when we need to determine if they met the Living in the Same Household (LISH) requirement.
- Only July 3, 2024, we updated our [instructions on the notice language clearance process](#) to include our office of customer experience.

12: Reduce Occurrence of Overpayments/Underpayments by Simplifying Policies and Processes and Automating Systems

Quick Wins/ Leading Actions:

- Eliminate the “informal” waiver process (where—if a person calls SSA and says that they want to request a waiver of recovery of a Social Security benefit overpayment—we will pause recovery for a time so they can complete the actual waiver request).
- Clarify POMS so that one waiver request form (SSA-632) can apply to multiple overpayments on a customer’s record.
- Update the POMS to ensure the assessment of whether a person is at fault in causing an overpayment is fair (including ensuring that consideration is given to mistakes SSA may have made in the case); clarify the presumption that a person is not at fault in causing an overpayment that occurred while they were temporarily hospitalized; and consider adding a presumption that a person is without fault in situations when a Supplemental Security Income (SSI) program overpayment was caused by the cash surrender value of a life insurance policy.
- Improve waiver policies on how we determine whether recovery would defeat the purpose of our programs (i.e., whether a person needs substantially all of their person’s income and resources for their ordinary and necessary living expenses) by increasing the allowable margin between monthly income and expenses from \$55 to \$250, excluding a second vehicle, and clarifying the POMS.
- Update waiver policies on how we “deem” that recovery would defeat the purpose of our programs when a person receives certain, needs-based assistance by:
 - Aligning OASDI and SSI policy so that SSI, the Temporary Assistance for Needy Families program, and needs-based Department of Veterans Affairs programs count for making this determination for both OASDI and SSI overpayments; and,
 - Counting two additional programs for this purpose: the Supplemental Nutrition Assistance Program and Medicare Part D Extra Help.
 - Also adding a new, deemed to defeat category for people who don’t receive one of the programs listed above, but whose incomes are at or below 150 percent of the Federal Poverty Level.
- Simplify the request for waiver form, SSA-632, by, among other things, separating it into two forms: a shorter form and a longer form (to be used when we can’t waive recovery based on the info collected on the short form alone).
- Consider treating requests for reconsideration on the fact or amount of an overpayment to also be implied requests for a waiver of recovery.

- Increase the overpayments that qualify for the simplified, “administrative waiver” process and consider increasing the small overpayments that qualify for automatic write-off without the overpaid person having to submit a request, to help ensure that we do not spend more on recovering certain overpayments than we would expect to recover.
- Create an internet application for the public to request that SSA waive recovery of an overpayment.
- Increase the thresholds that trigger additional reviews of decisions to release an underpayment (currently \$5,000 or more).

Accomplishments:

- Effective March 25, 2024, SSA stopped our practice of withholding 100 percent of an overpaid beneficiary’s monthly Social Security benefit by default if they fail to respond to our letter requesting that they repay an overpayment. We now instead use a much more reasonable default withholding rate of 10 percent of a person’s total monthly benefit, similar to the current default withholding rate in the SSI program.
- In May 2024, we updated our policies so that technicians can use the “administrative waiver” process on waiver requests on overpayments of up to \$2,000 (an increase from \$1,000). This is a simplified process that requires less development by our technicians and less burden on the public. In August 2023, we provided instructions on our waiver form about the availability of this process.
- SSA will now approve repayment plans of up to 60 months based on a person providing just a verbal summary of their income, resources, and living expenses (current SSI beneficiaries do not have to provide the summary).

13: Enhance Inbound and Outbound Payment Capabilities

Quick Wins/ Leading Actions:

- Engage with the Department of Treasury Bureau of Fiscal Service (BFS) to ensure there are clear expectations of roles and responsibilities related to the adherence to Direct Express SSA/BFS agreements. This includes clear expectations of the type of support the Direct Express vendor should offer customers and SSA technicians.
- Allow managers to continue to clear Direct Deposit Fraud Blocks over the phone for extenuating circumstances for customers who use Direct Express, as outlined in GN 02402.023 and update the Direct Express policy to include reference to existing policy in GN 02402.025, which allows Direct Express cardholders to update their payment method over the phone.

14: Expand and Improve Communication Methods and Channels to Improve Customer Service

Quick Wins/ Leading Actions:

- Enable two-way text/email and enhance communications more broadly between customers and employees:
 - Implement secure two-way communications capabilities in Message Center inclusive of allowing customers to ask inbound questions and enhancing ability for SSA staff to communicate directly with customers via Message Center.
 - Expand capabilities for employees to communicate with authenticated customers via email. TED will retain the record of interaction with the public.

- Create a “privacy statement-like,” one-time global consent statement for technicians or customers to read. And allow customers to authorize SMS/email communication for SSA applications.
- Expand electronic reminders for additional appointment types via SMS and email messaging.
- Implement event-based status update communications (considered as part of SSA’s enterprise communications product investment, which included SMS and email).
- Align communication solutions to common systems architecture to reduce the cost and time needed to modify messages (e.g., Notices, SMS, email communications).
- Expand Video as a Service Channel:
 - Implement a video solution that meets agency requirements to replace MS teams use with the public. The new web video solution provides a single-platform for employees to use with SSA-owned video units in field offices and third-party video partner sites in addition to connecting with the public without the need for the public to download a separate application. At the same time, the agency will implement high-definition video that will support our policies on acceptance of some evidence over video. This solution will provide an improved experience for both the customer and technician.
- Expand presence on YouTube and give more guidance on our programs and processes. Review our search engine optimization. (Quick Win)

Accomplishments:

- Streamlining communications to new Medicare enrollees:
 - SSA worked with CMS to add a button to the Medicare application confirmation screen on SSA.gov, which led users to a new landing page specially tailored for customers who just signed up for Part A and/ or B, driving roughly 20,000 new users to the Medicare Getting Started page each month, and serving about 130,000 visitors (as of end of May) since it went live in November 2023.
- Worked with OCOMM to attract younger beneficiaries and to share information about Ticket to Work Program and other work incentives:
 - Worked with OCOMM to market the National Disability Forum (NDF) focused on Tribal Communities with the goal of attracting younger beneficiaries, share information about Ticket to Work Program and other work incentives.
 - Invited experts in Tribal communities to serve on a Panel for the NDF August 29th, 2024 as Part 1 to promoting Employment Networks to establish SSA’s first ever Tribal Employment Network.
- Expanded our partnership with the Department of Education’s Rehabilitation Services Administration (RSA) Tribal Vocational Rehabilitation (VR) Program to develop a new strategy to advance the Ticket to Work Program for Tribal Nations.
- Expanded our partnership with the Department of Labor’s Office of Disability Employment Policy (ODEP) to develop a new strategy for joint outreach events to promote employment opportunities within Tribal communities.
- Expanded our partnership with the Bureau of Indian Affairs (BIA) to discuss Customer Experience goals and align Tribal Self-Determination goals while leveraging existing BIA resources within Tribal communities. Connected CX HISP program leads focused on improving service for Tribal Nations; BIA was interested in learning from SSA about how we are serving Indian Country to develop a strategy for future collaborations.

15: Improve Notice Practices: Format, Plain Language, Systems, Flexibility, Accessibility, Speed, and Cost of Production

Quick Wins/ Leading Actions:

Simplify:

- Rewrite/improve notices to reduce inquiries to 800 Number and/or field offices with focus on three notices: End of Year Tax Form 1099/1042, Title 2 overpayment, Title 16 overpayment.
- Conduct rigorous user testing for future notices, including voices from underserved communities.
- Implement Customer Experience (CX)-informed content/style: Deliver a style guide and content design guide based on service blueprint, plain language principles, testing, plus processes to support continued updates.
- Improve notice clarity and structure for all notices by including Customer Experience and Plain Language in the clearance process in addition to current focus on overpayment notices.

Digitize:

- Reduce the total number of notice inquiries to the call center and reduce print and mail costs by modernizing notices/notice production infrastructure.
- Offer customers digital alternatives such as SMS and email communications.

Modernize:

- Expand centralized print capabilities to allow for printing and mailing of notices and forms from an approved GPO print vendor instead of at local field offices.
- Design/develop/adapt systems infrastructure to support delivery of multi-channel notices (online, email, text, paper) flexibly across the SSA enterprise.

Accomplishments:

- Created the Notices Review Team (NRT), which is led by an experienced member of the Senior Executive Service with broad knowledge of SSA's organizational structure and its program. The NRT's objective is to assess and evaluate opportunities to eliminate those notices and enclosures that are not legally required, are otherwise duplicative, or fail to serve a business need that is strong enough to justify ongoing issuance. In addition, to assess whether an alternate form or modality of communication, or modifications to the language in the notice, would better meet the needs of SSA's customers while also reducing administrative costs and lessening incoming queries from agency customers.
- We are revising our sub-regulatory policy to add Customer Experience (CX) Review and Plain Language Review to our Notice Clearance Process. Making CX and Plain Language Review a standard part of the Notice Clearance Review Process will help ensure the notices are understandable, and customers are informed and guided, so they know what they need to do and when they need to do it.

16: Increase e-Signature Availability and Reduce Unnecessary Signature Requirements

Quick Wins/ Leading Actions:

- Expand e-signature capabilities to additional SSA forms that require a signature, (goal is eventually to have e-signatures on all signed forms), in line with the [2024 CX Delivery Commitment 2](#): Expanding the use of electronic signature and document upload functionality.

- Offer e-signature via *my* Social Security for customer self-service.
- Draft, finalize and implement new policy to allow customer e-signature for 3rd party signed forms/applications.
- Accept e-signatures from claimants on appointed representative documents, and allow representatives to use commercial e-signature solutions.
- Remove unnecessary signature requirements.
- Continue to review batches of forms for signature removal.

Accomplishments:

- SSA updated its Program Operations Manual System (POMS), so agency employees are no longer forced to require wet signatures from customers where alternative signature options, such as e-signature, are available.
- Removed wet signatures whenever possible:
 - Since March 2024, the agency has approved the removal of wet signatures on 13 forms, accounting for over 1 million submissions per year. SSA is currently reviewing other forms that account for over 3 million submissions per year.
 - SSA worked with the Internal Revenue Service (IRS) to develop and implement a process, allowing attestation for a W-4V Voluntary Withholding Request form instead of requiring SSA employees to send the form to customers for a wet signature.

17: Harmonize Policies, Communications, and Processes with CMS and Other Government Agencies

Quick Wins/ Leading Actions:

- Implement a liaison between SSA and the U.S. Citizenship and Immigration Services to assist with SSN issues.
- Work with CMS to enhance the CMS-40B Application for Enrollment in Medicare (Medical Insurance) Form to obtain additional information at first point of contact and remove the need for a wet signature.
- Increase interagency data sharing to improve program administration and payment accuracy.
- Remove the SSA 800 Number from the *Questions About Your Bill?* section on the CMS Medicare Billing notice that is sent to 23 million people annually since we cannot assist with billing, which will reduce calls to the SSA 800 Number and reduce customer wait times.
- As part of SSA's participation in the [Approaching Retirement Life Experience](#) cross-agency initiative, including the [Streamlining Medicare-only Enrollment](#) project, continue to work with CMS Office of Communications to ensure content and messaging aligns across both agencies.
- Capture lessons learned from other agencies (e.g., VA, IRS, CMS), to help us identify ways to improve the administration of our programs and improve the customer experience.

Accomplishments:

- On June 18, 2024, we [issued instructions](#) and implemented on processing Voluntary Tax Withholding (VTW) W-4V requests with verbal Signatures via attestation. This was a result of an inter-agency collaboration with IRS.

- We reached an agreement with CMS to remove the SSA 800 Number from the Questions About Your Bill? section on the CMS Medicare Billing notice that is sent to 23 million people annually since we cannot assist with billing.

18: Improve Usage of Data Analytics Across SSA with Better Governance and Common Standards

Quick Wins/ Leading Actions:

- Implement the Enterprise Data Strategy to increase the governance, consistency, usage, and data analytical support across the agency to inform decisions and create operational efficiency for better customer service.
- Improve the speed and policy compliance of disability adjudication by enhancing the Insight decision support tool used by adjudicators to check additional areas of decisional quality and policy compliance – including checks informed by leveraging enhanced medical record data from IMAGEN – and extract richer information on jobs cited in decisions.

Accomplishments:

- Insight has trained, validated, and released two new quality flags in July for isolated jobs and court-challenged jobs.

19: Implement Equity Action Plan and Address Underpayments

SSA Equity Action Plan Overview

Our mission is to deliver Social Security services and programs fairly to millions who rely on them as a financial safety net, leveraging strategies outlined in our [SSA Equity Action Plan](#), released in February 2022 and updated regularly. We continuously engage our stakeholders by sharing updates and achievements, through our [social media channels](#), [Communications Corner](#), [Dear Colleague Letters](#) to over 18,000 advocacy groups and organizations, and [Dear Tribal Leaders and American Indian Alaska Native Organizations Letters](#), and by exchanging ideas through public engagements, such as Listening Sessions and SSA Equity Initiative Feedback Sessions. Through our SSA Equity Action Plan, we save time and money, and make our programs fairer and more effective, for the American public and SSA, by collecting and utilizing demographic data to identify and correct service disparities. Here we provide examples of quick wins/leading actions and accomplishments; For comprehensive information, refer to our [Advancing Equity at SSA](#) webpage.

Quick Wins/ Leading Actions:

- Improve access to SSI for women, families, individuals from underserved communities, and other people facing barriers by implementing recommendations from Strategy #1 from the Equity Action Plan.
- Improve equity in access to programs for customers who communicate primarily in languages other than English by implementing recommendations from Strategy #2 from Equity Action Plan.
- Reduce pending SSI underpayments to improve equity in the delivery of payments to our customers disproportionately affected by poverty by implementing recommendations from Strategy #3 from the Equity Action Plan.

- Increase awareness of survivors benefits eligibility for children and families, same-sex couples, and people disproportionately impacted by COVID-19 by implementing recommendations from Strategy #4 from the Equity Action Plan.
- Increase demographic collection to further identify, monitor, and address service inequities by implementing recommendations from Strategy #5 from the Equity Action Plan.

Accomplishments:

- Strategy #1: We made it possible for more people to be eligible for SSI, and for people who receive SSI to better cover basic needs, such as food, clothing, medicine, and housing costs, by publishing three final rules, which, effective September 30, 2024, will: 1) [exclude food from In-Kind Support and Maintenance calculations](#); 2) [expand the rental subsidy policy to all people who receive SSI](#); and 3) [expand the definition of a public assistance household to include households receiving Supplemental Nutrition Assistance Program \(SNAP\) payments and households where not all members receive public assistance](#). With this change, SSA will reduce administrative costs because we will spend less time administering these former policies and related calculations, and addressing related payment inaccuracies. (Strategy #1)
- Strategy #1: We made it easier for people to receive quality representation to help them work through their SSI claims by: 1) allowing [appointed representatives](#) to access a list of all their cases pending at the initial and reconsideration levels through March 2024 enhancements to our [Appointed Representatives Services \(ARS\)](#) application, a computer program that allows appointed representatives to view their clients' disability claims in real time; and 2) working to centralize online our appointed representative referral list, with the [Department of Justice's online List of Pro Bono Legal Service Providers](#) as a benchmark. With these changes, SSA will reduce wait times on the 1-800-772-1213 line, for in-person service, and for replies to mail and faxes, by dramatically reducing phone, in-person, mail and fax requests from appointed representatives for information on their clients' cases.
- Strategy #2: We removed barriers for people who do not speak English as their primary language or who have a limited ability to read, speak, write, or understand English, to doing business with SSA by: 1) increasing the number of languages available at visitor check-in kiosks from 5 to 19; 2) translating and updating in fiscal year 2024 over 600 non-English language materials available into 17 languages (e.g., [www.ssa.gov/es](#), [Social Security Information in Other Languages webpage](#), "[Share Your Race and Ethnicity & Help Us Improve Service and Access](#)" poster; 3) launching in November 2023, our [Multi-Language YouTube channel](#); 4) launching in April 2024, our [Limited English Proficiency Toolkit](#) with articles and social media posts in our five most requested non-English languages, and information about our free [Interpreter Services](#) and [Multi-Language Gateway](#); and 5) releasing in 2024, our [Language Access Implementation Plan](#). With these changes, SSA will reduce administrative costs associated with rescheduling and repeating other actions to address challenges with limited interpretation services, and with translating and interpreting information to address limited materials available in non-English languages.
- Strategy #3: We dramatically decreased the time that people who are most in need wait to receive their underpayments, money owed to them, by: 1) [increasing, as of March 2024, the amount of an SSI underpayment that requires a prepayment review from \\$5,000 to \\$15,000](#); 2) [releasing, between the beginning of fiscal year 2024 and June 2024, about \\$901 million of underpayments, with about \\$209 million of that amount to roughly 81,000 people whose cases were among the oldest and highest priority underpayment cases](#); 3) [creating a centralized Underpayment Case Control log to monitor payments requiring a second review](#); and 4) implementing a dashboard tracking tool to monitor underpayments by certain demographics to better identify disadvantaged communities, in alignment with the Biden-Harris Administration's [Justice40 Initiative](#). With these changes, SSA will reduce administrative costs and time burden on correcting [errors in computations, a major cause of underpayments](#).

- Strategy #4: We educated targeted groups of people who may be eligible for death benefits about how to apply for death benefits, and made it simpler for people to apply for death benefits by: 1) providing regular trainings on survivors benefits; 2) publishing culturally sensitive materials such as the [Tribal Benefits Coordinator Guide 2023](#); 3) working to update Form SSA-721 [Statement of Death by Funeral Director](#) to capture information of dependents; and 4) reducing the time and effort people have to give to apply by eliminating certain questions and documentation requirements in [lump sum death payment cases](#). With these changes, SSA will reduce administrative costs and increase accessibility to survivor's benefits using data exchanges to identify people potentially eligible to receive survivors benefits.
- Strategy #5: We have enhanced our ability to find and fix gaps in how we serve different communities of [people through collecting and analyzing race and ethnicity data](#) by: 1) signing seven states and territories, between February 2023 and June 2024, to contracts to provide SSA with race and ethnicity information that they gather when people apply for social security numbers for newborns; 2) receiving race and ethnicity information through these contracts from Arizona as of January 13, 2024, and from Rhode Island as of June 11, 2024; and 3) improving access to our research grants and procurement opportunities to Historically Black Colleges and Universities (HBCUs), Institutions Serving Students of Color (ISSCs)³, Small and Disadvantaged Businesses (SDBs), and Historically Underutilized Business (HUB) Zones, such as through our [Retirement and Disability Research Consortium](#). With these changes, SSA will increased accurate data of customers served and analyze data to better determine whether our programs are equitably serving our applicants and beneficiaries.

Note: Additional accomplishments related to the Equity Action Plan are aligned to other initiatives

20: Implement FY 2024 Tribal Action Plan Recommendations

Quick Wins/ Leading Actions:

- Establish a Commissioner's Tribal Advisory Committee to ensure equitable access to SSA programs for Tribal Communities.
- Expand the Mobile Customer Service Model (tested by the Denver Region in remote locations in Alaska during FY 2023) to more areas to reduce the cost of travel for applicants for OASDI or SSI programs and services.
- Reduce overpayments and denied claims in Tribal communities for Tribal members who receive SSI benefits' and are impacted by income and resource policies due to Tribal payments provided under the Tribal General Welfare Exclusion Act in order to help ensure eligible Tribal members can access benefits. The IRS excludes the income for tax purposes; SSA counts the income in determining eligibility for the SSI program.

Accomplishments:

- On January 31st, SSA published and communicated the *FY2024 Tribal Action Plan* to all Tribal Nations via Dear Tribal Leader Letter. SSA released monthly communications to Tribal Leaders to convey program changes and established a subscription page to receive alerts of new Tribal Leader Letters.
- Launched a *National Training* monthly webinar series for the public who are Tribal benefit specialists providing direct support to Tribal members to reduce overpayments for SSI recipients and raise scam awareness.

³ Institutions Serving Students of Color (ISSCs) include Predominantly Black Institutions (PBIs), Hispanic-Serving Institutions (HSIs), Tribal Colleges and Universities (TCUs), Asian American and Native American Pacific Islander Serving Institution (AANAPISI), Alaska Native or Native Hawaiian-Serving Institutions (ANNHSI), and Native American Non-Tribal Institutions (NANTI).

- Under EO 14112:
 - SSA published a notice of funding opportunity and hosted an Information Session in April for the *Interventional Cooperative Agreement Program* on Grants.gov, inclusive of invitations released to all Tribal Leaders to ensure they are aware SSA seeks to research to assist claimants in underserved communities to apply for or appeal decisions on claims for SSDI and SSI benefits.
 - The Commissioner seeks to understand any authority to offer Tribal Set-Aside funds to ensure grant opportunities are available to Tribal communities. If successfully established, SSA will join other agencies to provide supplemental information for the *FY2025 Native American Funding Crosscut* for the first time.
 - The Commissioner signed a decision memorandum to approve the business process to establish a *Commissioner's Tribal Advisory Committee* to ensure equitable access to SSA programs for Tribal Communities. If successful established, a Tribal Committee at SSA will provide feedback or consultation to SSA Leaders for the first time.

21: Expand Access to Non-English Language Services and Forms to Improve Customer Experience and Reduce Workloads

Quick Wins/ Leading Actions:

- Provide instructional (non-fillable) forms in other languages to help non-English speaking customers complete SSA forms:
 - Build on recent success of creating instructional forms for the SS-5 and SSA-1020 applications available in other languages as instructional resources.
- Expand the use of SSA Spanish language forms beyond Puerto Rico:
 - Conduct a pilot in field offices and DDSs leveraging Puerto Rico's current business process in communities with high proportions of Spanish-speaking population.
 - Test available AI tools that can translate incoming Spanish forms and responses (e.g., disability applications, functional forms, and questionnaires).
- Increase the pool of available interpreters of the most requested languages for appointments:
 - Expand the use of Telephone Interpreter Services (TIS).
 - Collect and analyze data to determine where more bilingual hires would be helpful.
 - Develop a Bilingual Training Curriculum for front-line employees on the availability of TIS services, Limited English Proficiency (LEP) resources, and effectively communicating with LEP customers.

Accomplishments:

- Redesigned disability content on SSA.gov: SSA is making it easier for the public to read and understand content on its website in both English and Spanish. The goal is to provide clearer instructions on how to file for disability benefits via self-service options and set better expectations about wait times. Seventy-eight percent of English-speaking visitors and 88 percent of Spanish-speaking visitors have rated the new content helpful.
- Enhanced employee resources: Developed and launched the new LEP Hub, an internal website that provides resources and tools for SSA employees to help customers with LEP.

22: Enhance Outreach and Services to Children In Need

Quick Wins/ Leading Actions:

- Improve enrollment for children potentially eligible for survivors benefits by:
 - Identifying potentially eligible children through data matching; and,
 - Reaching out to surviving children’s families.
- Target outreach for potentially eligible SSI children by:
 - Identifying potentially eligible children through data matching; and,
 - Reaching out to likely eligible children’s families.
- Improve service for children in foster care by:
 - Seeking information from the public on how better to serve beneficiary children in foster care;
 - Improving SSA’s business processes for children in foster care; and,
 - Providing technical assistance to states exploring conservation of SSA benefits for children in foster care.
- Reduce burdens of dedicated accounts for SSI children by:
 - Publishing regulation to expand the uses of dedicated accounts; and,
 - Updating forms and policies to make dedicated account reporting easier for families and other representative payees.
- Revisit childhood sickle cell disease policy by:
 - Creating resources for adjudicators, communities, and providers on sickle cell claims.

Accomplishments:

- To help improve enrollment in SSA benefit programs for children and others, we:
 - Redesigned our web-pages www.ssa.gov/survivor and www.ssa.gov/family on June 13, 2024; and,
 - Published [Social Security Pays Benefits to Children After the Death of a Parent](#) on our public facing website on June 20, 2024.
- To improve service and outcomes for youth in foster care, we participated in a webinar with State and local foster care agencies on March 30, 2024. The webinar was hosted by the American Public Human Services Administration (APHSA) & Casey Family Programs (CFP) and included foster care leaders from 30 states. During the webinar, we offered to meet with any state or local agencies to provide technical assistance on SSA programs. Since the webinar, we have had direct engagement with Massachusetts, Minnesota, Wyoming, Washington, and New York City to provide technical assistance on SSA programs.

23: Simplify SSI Program by Implementing In-Kind Support and Maintenance (ISM) Reforms:

- Rental Subsidy Final Rule
- Definition of a Public Assistance Household Final Rule
- Omitting Food from ISM Calculations Final Rule

Quick Wins/ Leading Actions:

- **Implement Rental Subsidy Final Rule (Quick Win).** The rule is a win because it expands the SSI rental subsidy policy, which due to judicial decisions is currently only in place for SSI applicants and recipients residing in seven States (Connecticut, Illinois, Indiana, New York, Texas, Vermont, and Wisconsin). Under the rule, rental assistance, such as renting at a discounted rate, is less likely to affect a person's SSI eligibility or payment amount. This new rule extends the same advantageous policy to all SSI applicants and recipients nationwide. This may increase the benefit amount some people are eligible to receive and will allow more people to qualify for critical SSI payments.
- **Implement Expand the Definition of a Public Assistance Household Final Rule (Quick Win).** The rule is a win because it expands the definition of a public assistance household to include households receiving Supplemental Nutrition Assistance Program (SNAP) payments and households where not all members receive public assistance. The expanded definition will allow more people to qualify for SSI, increase some SSI recipients' payment amounts, and reduce reporting burdens for individuals living in public assistance households.
- **Implement Omitting Food from ISM Calculations Final Rule (Quick Win).** The rule is a win because it removes a critical barrier for SSI eligibility due to an applicant's or recipient's receipt of informal food assistance from friends, family, and community networks of support. The new policy further helps in several important ways: the change is easier to understand and use by applicants, recipients, and agency employees; applicants and recipients have less information to report about food assistance received from family and friends, removing a significant source of burden; the reduced month-to-month variability in payment amounts will improve payment accuracy; and the agency will see administrative savings because less time will be spent administering food ISM.

Accomplishments:

- On March 27, 2024, we published the [Omitting Food from ISM Calculations](#) final rule.
- On March 27, 2024, we issued a [press release](#) on the Omitting Food from ISM Calculations final rule.
- On April 11, 2024, we published the [Rental Subsidy final rule](#).
- On April 17, 2024, we issued a [press release](#) on the Rental Subsidy final rule.
- On April 19, 2024, we published the [Expand the Definition of a Public Assistance Household](#) final rule.
- On May 9, 2024, we issued a [press release](#) on the Expand the Definition of a Public Assistance Household final rule.
- We are on schedule to implement the three final rules on September 30, 2024.

24: Speed Adjudication Times by Publishing and Implementing Manner of Appearance Final Rule

Quick Wins/ Leading Actions:

- Publish Manner of Appearance Final Rule, allowing us to update our hearing regulations to provide that claimants may appear at hearings by agency video, online video, audio, or in person. Those four manners will be standard manners of appearance in our hearing process. We expect that this final rule, once implemented, will provide us and claimants with additional flexibility, allowing us to manage our hearing process more efficiently. (Quick Win)
- Implement Manner of Appearance Final Rule, allowing individuals who appeal their disability determinations at the ALJ level to consent to appear via video or telephone. Under this new rule, the agency will maintain scheduling flexibility to balance workloads more efficiently. (Quick Win)

25: Reduce Delays and Cost of Paying Claimant Representatives by Publishing and Implementing Marasco Final Rule

Quick Wins/ Leading Actions:

- Publish Marasco Final Rule, which allows claimants and claimant representatives to prepare for a new environment in which all representatives and entities seeking direct payment must register with the agency and in which representatives may choose to have us directly pay their authorized fees to an affiliated entity. (Quick Win)
- Implement Marasco Final Rule: Per the Marasco decision, our final rule will provide a reasonably reliable method for entities to receive direct payment of fees authorized to affiliated individual representatives. Implementing this rule will also standardize the claimant's representative registration, appointment, and payment processes.

26: Reduce Disability Backlog by Implementing Past Relevant Work Final Rule

Accomplishments:

- On April 18, 2024, we published the Past Relevant Work (PRW) final rule.
- We implemented our PRW rule that reduces the past relevant work period from fifteen to five years on June 22, 2024. This new rule reduces the burden on claimants and employees while providing enough information to make appropriate disability decisions.

27: Reduce the Occurrence of Overpayments by Publishing and Implementing Payroll Information Exchange (PIE) Final Rule

Quick Wins/ Leading Actions:

- Publish PIE Final Rule: Codifies the use of data exchanges to prevent improper payments; to reduce burden on beneficiaries, recipients, and rep payees through reduced reporting; and to reduce Agency staff processing time.
- Implement PIE Final Rule that should result in reduced customer and employee burden and increased payment accuracy.

Accomplishments:

- To reduce improper payments:
 - SSA published a notice of proposed rulemaking (NPRM) to describe our plans for a payroll information exchange, which is another important step by automating wage reporting for more beneficiaries. The comment period on the NPRM closed on April 15, and we are working towards publication of a final rule and implementation of the exchange.

Appendix A: Acronyms List

Acronym	Definition
AARPS	Appeals and Authorized Representative Processing Services
AFGE	American Federation of Government Employees
AI	Artificial Intelligence
AM	Administrative Message
AMP	Automated Medicare Process
APHSA	American Public Human Services Administration
AR	Assistance Request
ARS	Appointed Representative Services
BFS	Bureau of Fiscal Service
BIA	Bureau of Indian Affairs
BSO	Business Services Online
CBA	Call Back Assist
CCE	Consolidated Claims Experience
CDH	Customer Decision Hub
CE	Consultative Examination
CFP	Casey Family Programs
CHIP	Customer Help and Information Program
CMS	Centers for Medicare & Medicaid Services
COA	Change of Address
COLA	Cost-of-Living Adjustment
COSS	Commissioner of Social Security
CRM	Customer Relationship Management
CSR	Customer Service Representative
CX	Customer Experience
DDS	Disability Determination Service
DETO	Domestic Employees Teleworking Overseas (DETO)
DIB	Disability Insurance Benefits
DOB	Date of Birth
DOT	Dictionary of Occupational Titles
ELAS	Electronic Leads & Appointment System
EM	Emergency Message
ERE	Electronic Records Express
FEVS	Federal Employee Viewpoint Survey
FO	Field Office
GPO	Government Publishing Office
GS	General Schedule
HBCU	Historically Black Colleges and Universities
HD	High Definition
HHS	Health and Human Services
HISP	High Impact Service Providers

Acronym	Definition
HIT	Healthcare Information Technology
HUB	Historically Underutilized Business
iBEVE	Internet Benefit Verification
IMAGEN	Intelligent Medical Language Analysis Generation
IRS	Internal Revenue Service
ISM	In-Kind Support and Maintenance
ISSC	Institution Serving Students of Color
IVR	Interactive Voice Response
LEP	Limited English Proficiency
LI	Limited Issue
LISH	Living In the Same Household
LSDP	Lump Sum Death Payment
MACADE	Manual Adjustment Credit and Award Data Entry
MCS	Modernized Claims System
MDW	Message to the Designated Worker
MS	Microsoft
NCPS	National Case Processing System
NDF	National Disability Forum
NIST	National Institute of Standards and Technology
NLDP	National Leadership Development Program
NPRM	Notice of Proposed Rulemaking
NRT	Notice Review Team
OASDI	Old Age, Survivors, Disability Insurance
OCO	Office of Central Operations
OCOMM	Office of Communications
ODEP	Office of Disability Employment Policy
OHO	Office of Hearings Operations
OJT	On-the-job Training
OQR	Office of Quality Review
PC	Processing Center
PIE	Payroll Information Exchange
POMS	Program Operations Manual System
PRW	Past Relevant Work
RCC	Representative Call Center
RSA	Rehabilitation Services Administration
SDB	Small and Disadvantaged Businesses
SDF PIN	Systems Development Facility Personal Identification Number
SMS	Short Message Service
SNAP	Supplemental Nutrition Assistance Program
SSA	Social Security Administration
SSDI	Social Security Disability Insurance
SSI	Supplemental Security Income

Acronym	Definition
SSN	Social Security Number
SSNAP	Social Security Number Application Process
T2	Title II of the Social Security Act
TED	Technician Experience Dashboard
TIS	Telephone Interpreter Services
TSC	Teleservice Center
UMCC	Union Management Cooperation Council
USWDS	United States Web Design System
VA	Veterans Affairs
VIPr	Visitor Intake Process
VR	Vocational Rehabilitation
W4V	IRS Voluntary Withholding Request Form
WAC	Workload Action Center
WLB	Work Life Balance
WSU	Workload Support Unit