



2015

ANNUAL REPORT

Social Security Advisory Board

Message from

We are pleased to publish the 2015 Annual Report of the Social Security Advisory Board. The report provides an overview of the Board's work in 2015. The Board's mission is to advise the President, Congress, and the Commissioner of Social Security on matters of policy and administration of the Old-Age, Survivors, and Disability Insurance (OASDI) and the Supplemental Security Income (SSI) programs. In 2015, the Board worked closely with the Social Security Administration (SSA) and other stakeholders to identify areas for improvement and to publish recommendations. We are grateful to Acting Commissioner Carolyn Colvin, SSA employees, congressional staff, representatives of other government agencies, and the many experts who met with us throughout the year.

Major publications the Board released in 2015 include the Board's annual [SSI statement](#) (which is also an appendix to SSA's [Annual Report of the SSI Program](#)), an [issue brief](#) on the Single Decision Maker (SDM) pilot, and a [position paper](#) on Windfall Elimination Provision (WEP). The Board also commissioned an independent [technical panel review](#) of the methods used by SSA actuaries to assess the financial status of the Social Security trust funds.

The Board's SSI statement encouraged SSA to review the administratively burdensome process it uses to determine and then monitor in-kind support and maintenance (ISM) for SSI recipients. The issue brief on SDM noted that SSA set up a pilot program without a model for evaluation, making it difficult to assess its effectiveness. The Board's position paper on WEP proposed replacing the current formula with one utilizing actual earnings data as SSA will have complete earning records, including earnings not covered by Social Security, beginning in 2017. Finally, the Board received the results of its independent technical panel in September. The Technical Panel on Methods and Assumptions concluded that the assumptions of the Trustees and the methods of the Office of the Chief Actuary were reasonable, but suggested several ways to improve these projections and to communicate them more effectively.

In 2015, the Board launched a multi-year review of SSA's representative payee program. SSA projects the need for representative payees among retirees will increase by almost 50 percent between 2013 and 2025. The Board met with SSA several times to assess the agency's capacity to oversee this program now and in the future. In October, SSA hosted a representative payee symposium for Board members and various agency components involved in the representative payee program. The event provided background to Board members regarding processes and issues. In 2015, the Board saw yet again the importance of gaining input directly from SSA's employees working in field and hearing offices, and in the regional offices, as well as personnel in Disability Determination Services (DDS) offices. In February, the Board met with DDS staff in Fairfax, Virginia to gather information about the disability evaluation process. And in March, the Board traveled to New York and met with SSA executives, members of management, and field staff.

Selected Acronyms

ALJ	Administrative Law Judge	ISM	In-Kind Support and Maintenance	SDM	Single Decision Maker
DDS	Disability Determination Service	NBER	National Bureau Of Economic Reserach	SSA	Social Security Administration
DMF	Death Master File	OASDI	Old-Age and Survivors Disability Insurance	SSDI	Social Security Disability Insurance
EDR	Electronic Death Reporting	OPM	Office of Personnel Management	SSI	Supplemental Security Income
				WEP	Windfall Elimination Provision



the Board

These visits allow the Board to receive direct feedback about how policy changes are communicated from headquarters and the challenges faced by employees providing “front line” service to the public. In New York, the Board also met with private disability insurers and legal aid staff to gain outside perspective about disability evaluations and resource and asset issues in the SSI program. This input is invaluable to the Board’s understanding of the program and its administration. SSA’s disability workload at the end of fiscal year 2015 included 1.1 million claims pending at the hearings level, with an average wait time of 526 days. The Bipartisan Budget Act of 2015 required the Office of Personnel Management (OPM) to create a new register of administrative law judges (ALJs) for SSA to use in hiring, as one way to address the aging disability caseload.

SSA continues to face significant challenges, including long-term solvency questions and staff shortages, which likely contribute to lengthy service delays to the public. Improved systems technology would allow SSA to provide more online services and additional service delivery options. Data integration will eliminate the need for employees to make the same entries into different databases, improving efficiency and accuracy. It is vital that the agency focus on providing the best possible service to the public as the Social Security programs provide vital income for millions of Americans. Per our charge, we look forward to continuing to provide pertinent analyses and advice on SSA’s policies and operations.

Henry J. Aaron, Chair

Lanhee J. Chen • Alan L. Cohen • Barbara B. Kennelly

Dorcas R. Hardy • Jagadeesh Gokhale • Bernadette Franks-Ongoy

ABOUT THE BOARD

Mission Statement

The Social Security Advisory Board is a bipartisan, independent federal government agency established in 1994 to advise the President, the Congress, and the Commissioner of Social Security on matters of policy and administration of the OASDI and the SSI programs. The seven members of the Board are appointed by the President, the Senate, and the House of Representatives.

Board Functions

1	Analyze the nation's retirement and disability systems and make recommendations with respect to how the OASDI program and the SSI program, supported by other public and private systems, can most effectively assure economic security
2	Study and make recommendations relating to the coordination of programs that provide access to health care with programs described in paragraph (1)
3	Make recommendations to the President and Congress with respect to policies that will ensure the solvency of the OASDI program, both in the short-term and the long-term
4	Make recommendations with respect to the quality of service that SSA provides to the public.
5	Make recommendations with respect to policies and regulations regarding the OASDI and SSI programs.
6	Increase public understanding of the social security system.
7	Make recommendations with respect to a long-range research and program evaluation strategy for SSA.
8	Review and assess any major studies of social security as may come to the attention of the Board.
9	Make recommendations with respect to such other matters as the Board determines to be appropriate.

Board Members

The Board has seven members. Three are appointed by the President, by and with the advice and consent of the Senate. Not more than two of such members shall be from the same political party. Two members shall be appointed by the president pro tempore of the Senate with the advice of the chair and the ranking minority member of the Senate Committee on Finance. Two members shall be appointed by the Speaker of the House of Representatives, with the advice of the chair and the ranking minority member of the House Committee on Ways and Means.

Current Board Members



Henry J. Aaron, Chair (D) 2020

Lanhee J. Chen (R) 2018

Alan L. Cohen (D) 2016



Barbara B. Kennelly (D) 2017

Dorcas R. Hardy (R) 2016



Jagadeesh Gokhale (R) 2021

Bernadette Franks-Ongoy (D) 2018

All Board member terms expire September 30th of year indicated

Current Members

Board Biographies

Henry J. Aaron



Henry J. Aaron, Ph.D. is the Bruce and Virginia MacLaury Senior Fellow in the Brookings Institution Economic Studies Program, which he directed from 1990 through 1996. Dr. Aaron previously taught at the University of Maryland and at Harvard University. He served as assistant secretary for planning and evaluation at the Department of Health, Education, and Welfare and chaired the 1979 Advisory Council on Social Security. He is a member and vice chair of the District of Columbia

Health Benefits Exchange. He is a member of the Institute of Medicine, the American Academy of Arts and Sciences, the Advisory Committee of the Stanford Institute for Economic Policy Research, and the Center on Budget and Policy Priorities. He was a member of the Congressional Budget Office Panel of Economic Advisors and Panel of Health Advisors, the visiting committees of the Harvard Medical and Dental Schools and Department of Economics, and the Boards of Directors of Abt Associates, Georgetown University, and the College Retirement Equity Fund. Dr. Aaron was a founding member, vice president, and the Board Chair of the National Academy of Social Insurance. He has been vice president and member of the executive committee of the American Economic Association, was president of the Association of Public Policy and Management. He received a B.A. from U.C.L.A in political science and economics and holds an M.A. in Russian regional studies and a Ph.D. in economics from Harvard University. Current term of office: September 2014 to September 2020.

Lanhee J. Chen



Lanhee J. Chen, Ph.D. is the David and Diane Steffy Research Fellow at the Hoover Institution; director of domestic policy studies and lecturer in the public policy program at Stanford University; lecturer in law at Stanford Law School; and an affiliate of the Freeman Spogli Institute for International

Studies at Stanford University. Dr. Chen was the policy director for the Romney-Ryan 2012 presidential campaign, as well as Governor Romney's chief policy advisor; a senior strategist on the campaign; and the person responsible for developing the campaign's domestic and foreign policy. In the George W. Bush Administration, Dr. Chen was a senior official at the Department of Health and Human Services. He also served as domestic policy director of Governor Romney's first campaign for president and as a health policy advisor on President George W. Bush's reelection campaign. Dr. Chen was also an associate attorney at the international law firm of Gibson, Dunn & Crutcher LLP. Dr. Chen currently serves on the Board of Trustees of the Junior Statesmen Foundation and on the Advisory Board of the Partnership for the Future of Medicare. He earned his Ph.D. and A.M. in political science from Harvard University, his J.D. *cum laude* from Harvard Law School, and his A.B. *magna cum laude* in government from Harvard College. Current term of office: September 2014 to September 2018.

Alan L. Cohen



Alan L. Cohen, Ph.D. is a senior fellow at the Center for American Progress working on Social Security issues. Previously, he served as senior budget advisor and chief counselor for Social Security for the Senate Committee on Finance from 2001 to 2012.

From 1993 to 2001, Dr. Cohen served as senior advisor for budget and economics to the Secretary of the Treasury and from 1999 to 2000, he served as the budget economist for the Senate Committee on Finance. From 1983 to 1992, Dr. Cohen was first the senior economist, and then the assistant staff director for priorities on the U.S. Senate Budget Committee. From 1979 to 1983, Dr. Cohen worked as a policy analyst / economist at the Office of the Assistant Secretary for Planning and Evaluation at the U.S. Department of Health and Human Services. Dr. Cohen received a B.A. from Grinnell College, an M.P.P. from the University of Michigan, and a Ph.D. from the University of Wisconsin. Current term of office: September 2014 to September 2016.

Barbara B. Kennelly



Barbara B. Kennelly is president of Barbara Kennelly Associates and is a Distinguished Professor at Trinity University. She served as president of the National Committee to Preserve Social Security and Medicare from 2002-2011. Congresswoman Kennelly served 17 years in the United States House of Representatives, representing the First

District of Connecticut. During her congressional career, Congresswoman Kennelly was the first woman elected to serve as the vice chair of the House Democratic Caucus, the first woman to serve on the House Committee on Intelligence, the first woman to serve as chief majority whip, and the third woman in history to serve on the 200-year-old Ways and Means Committee. During the 105th Congress, she was the ranking member of the Subcommittee on Social Security. Prior to her election to Congress, she was the Secretary of State of Connecticut. After serving in Congress, Congresswoman Kennelly was appointed to the position of counselor to the commissioner at SSA. As counselor, Congresswoman Kennelly worked closely with Commissioner Kenneth S. Apfel and members of Congress to inform and educate the American people on the choices they face to ensure solvency of Social Security. She served on the policy committee for the 2005 White House Conference on Aging. Congresswoman Kennelly received a B.A. in economics from Trinity College, Washington, D.C. She earned a certificate from the Harvard Business School on completion of the Harvard-Radcliffe program in business administration and a master's degree in government from Trinity College, Hartford. First term of office: January 2006 to September 2011. Current term of office: March 2012 to September 2017.

Dorcas R. Hardy



Dorcas R. Hardy is president of D.R. Hardy & Associates, a government relations and public policy firm serving a diverse portfolio of clients. After her appointment by President Ronald Reagan as assistant secretary of human development services, at the Department of Health, Education, and Welfare, Ms. Hardy was appointed Commissioner

of Social Security (1986 to 1989) and was appointed by President George W. Bush to chair the Policy Committee for the 2005 White House Conference on Aging. Commissioner Hardy has launched and hosted her own primetime weekly television program, "Financing Your Future," on Financial News Network and UPI Broadcasting, and "The Senior American," a NET political program for older Americans. She speaks and writes widely about domestic and international retirement financing issues and entitlement program reforms and is the co-author of *Social Insecurity: The Crisis in America's Social Security System* and *How to Plan Now for Your Own Financial Survival*, Random House, 1992. A former chief executive officer of a rehabilitation technology firm, Commissioner Hardy promotes redesign and modernization of the Social Security, Medicare, and disability insurance systems. Additionally, she chaired a task force to rebuild vocational rehabilitation services for disabled veterans for the Department of Veterans Affairs. She received her B.A. from Connecticut College, her master's in Business Administration from Pepperdine University, and completed the executive program in Health Policy and Financial Management at Harvard University. Commissioner Hardy is a certified senior advisor and serves on the Board of Directors of Wright Investors' Service Managed Funds, and First Coast Service Options of Florida. First term of office: April 2002 to September 2004. Second term of office: October 2004 to September 2010. Current term of office: October 2010 to September 2016.

Jagadeesh Gokhale



Jagadeesh Gokhale is the Director of Special Projects at Penn Wharton Public Policy Initiative (Penn Wharton PPI). Prior to joining PPI, Dr. Gokhale was a senior fellow at the Cato Institute. Earlier he worked at the American Enterprise Institute as a visiting scholar

(2003), the Treasury Department as a consultant (2002), and the Federal Reserve Bank of Cleveland as a senior economic advisor (1990-2003). An economist by training, his main research fields are macro and public economics with a special focus on the effects of fiscal policy on future generations. In 2008, he served as a member of the Task Force on Sustainability Issues for the Federal Accounting Standards Advisory Board. Dr. Gokhale has written extensively on policy issues including Social Security and Medicare reform, national saving, private insurance, financial planning, wealth inequality, generational accounting, and public intergenerational transfers and he has testified several times before Congress on these topics. He has published several papers in the *American Economic Review*, *Journal of Economic Perspectives*, *Quarterly Journal of Economics*, *Review of Economics and Statistics* and in publications of the National Bureau of Economic Research and the Cleveland Federal Reserve; in the US Budget report's *Analytical Perspectives*; and in newspapers and online media such as the *Wall Street Journal*, *The Financial Times*, the *Washington Post*, *American Spectator*, and *Forbes*. Dr. Gokhale is a co-author of *Fiscal and Generational Imbalances* that revealed the fiscal imbalance to be in the tens of trillions of dollars. In 2010, he published *Social Security: A Fresh Look at Policy Alternatives*, which constructs a different method for determining solvency of the Social Security trust funds. First term of office: November 2009 to September 2015. Current term of Office: October 2015 to September 2021.

Bernadette Franks-Ongoy



Bernadette Franks-Ongoy is the executive director for Disability Rights Montana, an organization that protects and advocates for the human, legal, and civil rights of Montanans with disabilities. She manages and oversees the day-to-day activities of Disability

Rights Montana and sets the tone to ensure that the organization's mission to advance dignity, equality, and self-determination is being accomplished. Ms. Franks-Ongoy says, "I was raised by a mother with a disability and a father who did not realize he was a feminist." She lived in an accessible house before the Americans with Disability Act was the law. Her mother's wheelchair could access every room. "After all mom needed to have access to my brothers and sisters rooms with her wheelchair." Ms. Franks-Ongoy is the youngest of eight siblings including a brother with a mental illness. Ms. Franks-Ongoy grew up in the sugar plantation town of Waiialua, Hawaii. With the support of Job Corps, Social Security, and other financial aid, she attended and graduated from Chaminade University with a Bachelor of Science degree in criminal justice and a Bachelor of Arts degree in sociology. She graduated from the University Of San Diego School Of Law in 1983. Her past legal experience includes: law clerk for the First Judicial Circuit Court in Hawaii, founding executive director of the Hawaii Bar Foundation Deputy Corporation Counsel, city and county of Honolulu, and attorney and director of programs for the Protection and Advocacy System in Hawaii. She is licensed to practice law in Hawaii and with the United States Court of Appeals for the Ninth Circuit. Ms. Franks-Ongoy has served as president of the National Disability Rights Network and most recently was a member of Montana's Equal Justice Task Force. Current term of office: January 2013 to

Visit to Disability Determination Services

- **February 24:** The Board traveled to Fairfax, Virginia to meet with DDS staff and regional management who traveled down from Region III headquarters in Philadelphia. Local staff demonstrated a real-time evaluation of an application for Social Security Disability Insurance (SSDI) benefits and answered questions about operations of a DDS.

Technical Panel Presentation

- **September 25:** The Board hosted an event to announce the findings of the Technical Panel on Assumptions and Methods at the National Press Club. The panel chair introduced its findings and recommendations, and panel members spoke about individual topics and responded to questions from invited guests.

New York City Visit - March 23-24: The Board held a series of meetings in New York with Region II SSA executives, management, field office staff, and other stakeholders. The Board toured a Social Security card processing center in Brooklyn. The first card center opened in Brooklyn in November 2002, three more have opened up in the New York region, and ten more are now located throughout the country. These card centers were created after the tragedy of September 11, 2001, in order to enhance public service and strengthen the integrity of the Social Security Number.



National Bureau of Economic Research Summer Institute - July 21-22: Several Board staff attended sessions of the National Bureau of Economic Research (NBER) Summer Institute, where scholars presented their latest research on aging and Social Security related issues.

Jagadeesh Gokhale Reappointed - October 5: The Senate nominated Jagadeesh Gokhale to serve his second term on the Board. Mr. Gokhale previously served on the Board from November 19, 2009, until his term expired at the end of September 2015.

Representative Payee Symposium - October 23: SSA hosted a representative payee symposium for Board members and staff. The Board was briefed by several SSA components about their roles in the representative payee programs and members asked questions about the challenges facing the representative payee program.



Publications

2015 Publications

June 2015: [The Single Decision Maker Pilot: A 16 Year Flight and Still No Clear Landing](#)

August 2015: [2015 Statement on the Supplemental Security Income Program, The Complexity of In-Kind Support and Maintenance](#)

September 2015: [2014 Annual Report](#)

October 2015: [The Windfall Elimination Provision: It's Time to Correct the Math](#)

Board-Commissioned Reports

September 2015: [2015 Technical Panel on Assumptions and Methods](#)



Board publications can be accessed at: <http://ssab.gov/Our-Work>

Board chair Henry Aaron addresses the Technical Panel members and audience during the public presentation to announce findings of the report.





Highlights of Monthly Board meetings

The Board held 11 monthly meetings in 2015, one of which was a visit to the New York Region, and another a visit to SSA headquarters in Woodlawn, MD. These meetings are opportunities for Board Members to gain insight on policies and procedures germane to SSA executives and management as well as congressional staff, union officials, advocacy groups, and outside experts. The Board met several times with Acting Commissioner Carolyn Colvin, Acting Deputy Commissioner LaMont Eanes, Chief Actuary Stephen Goss, and with deputy commissioners from SSA components to discuss agency challenges and efforts to improve public service.

Meeting topics for 2015 included assigning representative payees for foster children receiving SSI; SSA’s expansion of cooperative disability investigation units; SSA’s Vision 2025 report; data exchange concerns; the agency backlog plan to address the disability workload at the hearings level, entitled A Plan for Compassionate And Responsive Service or CARES; and concerns about the hiring process of ALJS through OPM. The Board heard from SSA Executives and other experts regarding long-term trust fund solvency projections; the need to modernize SSA systems and the status and effectiveness of the Disability Case Processing System a multi-year and multi-million dollar effort to integrate multiple state computer legacy systems into a single system. The Board also consulted with specialists on project topics, such as WEP; the SDM pilot; representative payees, and the Death Master File (DMF).

Single Decision Maker Issue Brief

In June, the Board published [*The Single Decision Maker Pilot: A 16 Year Flight and Still No Clear Landing*](#). The issue brief addressed SSA’s SDM pilot program that was established in 1999 and eventually expanded to include 20 states. SDM authority allowed disability examiners in specified states to issue favorable decisions in certain types of cases without a medical consultant’s signature. The concept was to reduce processing time for cases that were likely to be favorable and allow medical consultants to concentrate on the more difficult claims.

SSA allowed each DDS pilot site to design its own process for assigning cases to examiners with the SDM authority. Different components within SSA that reviewed the effectiveness of the pilot had

some inconsistent findings. The Board found that the pilot design did not effectively capture data to make evaluation meaningful. The Board could not recommend either the expansion or elimination of the SDM program. Instead, the Board recommended that SSA put a comprehensive research design and evaluation plan in place prior to initiating any more pilots or demonstration projects.

In the fall, Congress passed the Bipartisan Budget Act of 2015, which included a provision stating that the “Commissioner must make every reasonable effort to ensure that a qualified physician, psychiatrist or psychologist has completed the medical portion of the case review.” This language ended the SDM pilot. SSA was given a deadline of October 2016 to effectuate the change.

Supplemental Security Income Statement on In-Kind Support and Maintenance

Every year, the Board is offered the opportunity to include a [statement](#) about the SSI program in SSA's [Annual Report of the Supplemental Security Income Program](#) to the President and Congress. This year, the Board commented on the analysis that is used in setting SSI payment levels. The Board noted that there was strong evidence that the current process is administratively burdensome, overly complicated, and leads to many improper payments. The Board recommended a thorough reexamination of the way in which the agency adjusts benefits for ISM. Determining whether an SSI benefit should be reduced because of non-cash support involves delving into personal living situations and making adjustments whenever there is a change in circumstances. All of this administrative time results in changes to benefit amounts in approximately nine percent of SSI cases.

Failure to calculate changes timely and accurately are a large source of improper payments. The amount of overpayments have remained fairly steady, but underpayments have been increasing at a much faster rate. Since SSI is a needs-based program, the increasing number of underpayments is of particular concern. In its statement, the Board urged rigorous evidence-based research to find simpler ways to administer the SSI program, including a cost analysis to determine whether the savings in ISM reductions is worth the cost of managing the improper payments that result and the cost of maintaining policies and procedures to determine ISM reductions. The Board also noted that SSA needs to investigate the causes for a recent upward trend in improper underpayments.

Committee for a Responsible Federal Budget Conference

On August 4, Board member Alan Cohen participated in a discussion session on the SSDI program sponsored by the Committee for a Responsible Federal Budget as part of its McCrery-Pomeroy SSDI Solutions Initiative. The initiative solicited a broad spectrum of proposals for improving the SSDI program. The resulting 12 papers were presented at the SSDI Solutions Conference attended by several Board members and staff.

As a member of the closing panel, Mr. Cohen addressed the hearings backlog and identified this as being a result of inadequate funding. He indicated that there is a demand for more staff and resources. Mr. Cohen also expressed his support for a national Medicaid buy-in program with “generous income and asset limits.” Mr. Cohen expressed his opposition to disability benefit cuts, as benefits are the sole source of income for a majority of SSDI beneficiaries, and he stated that without payroll tax reallocation, the agency would have to cut benefits by 20 percent.



Disability Research Consortium & Retirement Research Consortium

Board members and staff attended the Disability Research Consortium from August 5th through 6th. The consortium consists of two cooperatively funded research centers: Mathematica Policy Research Center for Studying Disability Policy and the NBER Disability Research Center. The centers are funded by SSA. Board members Alan Cohen and Jagadeesh Gokhale spoke about the state of the disability program. Mr. Cohen addressed the lack of resources that has led to the disability case backlog. He also noted that SSDI benefits are modest. Mr. Gokhale described his proposal for reforming the SSDI program by introducing an earnings subsidy which is less-than-fully offset by current benefit reductions. This reform would effectively encourage beneficiaries to work and earn above the Substantial Gainful

Activity level without fear of losing eligibility to benefits because of earnings.

Board staff attended the Retirement Research Consortium from August 6th through 7th. The consortium consists of three multidisciplinary centers housed in separate institutions: Boston College, the University of Michigan, and NBER and is funded through cooperative agreements with SSA. Staff heard from panelists on a range of topics such as retirement incentives, asset accumulation, health, immigration, employment, retirement, and saving.

Windfall Elimination Provision

In October, the Board published a position paper, [*The Windfall Elimination Provision: It's Time to Correct the Math*](#). The Board's recommendation was for Congress to replace WEP for new retirees who had a portion of their careers in work not covered by Social Security. SSA began collecting data on noncovered earnings back in 1982 and by 2017, 35 years of data will be available—the amount necessary for SSA to perform more accurate benefit calculations for noncovered wages. SSA will then have the earnings data to calculate a benefit proportional to covered and noncovered earnings. The Board recommended that beginning in 2017, Congress change the current formula to one that uses actual earnings data.



Technical Panel on Assumptions & Methods

Every four years, the Board commissions a panel of expert economists, demographers, and actuaries to review the assumptions of the Social Security Trustees and the methods the Office of the Chief Actuary used in projecting the finances of the Social Security trust funds. The 2015 Technical Panel on Assumptions and Methods was chaired by Alicia H. Munnell of Boston College and included economists Katharine G. Abraham (University of Maryland), David Autor (Massachusetts Institute of Technology), Jeffrey R. Brown (University of Illinois), Peter Diamond (Massachusetts Institute of Technology), and Claudia Goldin (Harvard University); actuaries Sam Gutterman (consulting actuary) and Joe Silvestri (Government Accountability Office); and demographers Ronald R. Rindfuss (University of North Carolina) and Michael Teitelbaum (Harvard Law School). The panel held two meetings in 2014, but conducted the majority of its work in 2015, meeting six times and issuing its final report and recommendations, [2015 Technical Panel on Assumptions and Methods](#), in September.

On September 25th, the Board convened a meeting with the technical panel to discuss the panel's findings. Also invited were staff representing the various trustees and other individuals from agencies such as the Congressional Budget Office and Government Accountability Office. The panel concluded that although they had some disagreements with the trustees and actuaries, the overall approach adopted by the trustees and the methods and assumptions employed by the Office of the Chief Actuary in the annual projections of OASDI finances were reasonable.

The panel recommended that the trustees assume lower rates of fertility, faster rates of improvement in life expectancy, and lower interest rates over the long run. If adopted together, these three changes to the current assumptions would increase the currently projected 75-year deficit by about 28 percent. The Panel also recommended several variations for presenting the relationship between earnings and benefits (including measures of "replacement rates") and alternative ways of presenting the uncertainty of projections in the annual Trustees' report.



Technical panel Chair Alicia Munnell of Boston College gives an overview of report findings during the public meeting with the Board.

Administrative Law Judges

SSA has an unprecedented number of disability claims pending at the hearings level. The length of time it takes to get a decision at this level is also increasing, and SSA reported to the Board that it needs to hire hundreds of new ALJs in the next few years to address this critical workload. SSA executives met with the Board and outlined the current process, cost, timeframe and need for interagency cooperation with OPM, which announces, tests and prepares a register of candidates for agencies hiring ALJs to consider. The Board Chair enlisted the efforts of the Administrative Conference of the United States, Treasury, and the Office of Management and Budget to tackle the problems in the ALJ hiring process. Board members Henry Aaron (chair) and Lanhee Chen authored an article in Politico, "[How to fix the backlog of disability claims](#)" to draw attention to the problem.

Death Master File

The DMF was created in 1980 when Congress required SSA to make records of deceased Social Security number holders available to the public under the Freedom of Information Act. This ruling resulted from a lawsuit, *Perholtz v. Ross*, filed in 1978 against SSA, in an effort to gain access to the death information in the agency's files. Currently, the agency provides a more complete DMF extract to specific federal agencies for assistance in meeting their mission, and also to the Department of Commerce, which manages the sale and release of the information to private industry.

The DMF is an extract of death information from SSA's electronic database containing Social Security numbers assigned to individuals since 1936. It includes, when available, the deceased individual's Social Security number, first name, middle name, surname, date of birth, and date of death, and contains beneficiary and non-beneficiary death data that has been reported from states and other sources. SSA verifies death when the report pertains to a Social Security beneficiary. It does not verify non-beneficiary reports of death. However, it will share these reports with other specified agencies that Congress has indicated should receive the information. All releases of DMF information include a disclaimer cautioning that not all death data included in the DMF has been verified, yet there have been several news reports about live

individuals being reported as deceased in the DMF, which have brought public and congressional scrutiny to SSA's management of the data.

In June, the Board met with Inspector General Patrick O'Carroll. Mr. O'Carroll explained how inaccurate data can end up on the DMF and how this could potentially lead to improper payments. Marianna LaCanfora, Assistant Deputy Commissioner for the Office of Retirement and Disability Policy, also discussed the DMF and its complexities. Ms. LaCanfora stated the accuracy of the database is improving as more states adopt an electronic death reporting (EDR) system. She further noted that SSA constantly updates and corrects information in the DMF, but if external users do not purchase regular updates of the file, they do not receive the corrections. That failure to purchase updates and to continually correct misinformation is perceived as one major cause of inaccurate death data having a long-term effect on the financial lives of those living people who mistakenly appear on the DMF. The Board also met with Patricia Potrzebowski, National Association of Public Health Statistics and Information Systems, to learn more about EDR and her organization's role in representing state vital record agencies and her recommendations to improve data accuracy. The Board will undertake the DMF issue in 2016.

Representative Payee Meetings & Symposium

In 2015, the Board kicked off a comprehensive examination of SSA's representative payee program. It met with representatives from SSA's Office of Retirement and Disability Policy and Office of Quality Improvement to discuss the agency's procedures for monitoring representative payees. The Board met with executives from SSA's Office of Inspector General to discuss its recent audits, investigations, and challenges related to the representative payee program. The Board also heard from members of the National Council of Social Security Management Associations, which represents SSA field office managers and supervisors; officials from the Government Accountability Office; and the Department of Veterans Affairs.

In October, SSA hosted a day-long symposium for the Board at its headquarters in Baltimore, Maryland. The meeting provided the Board with an important opportunity to interact with the many different SSA components involved in the representative payee program. The symposium featured background on the historical, legal, operational, and policy perspectives of the program. Other sessions focused on legislative history, demographics, capability, payee selection, monitoring, payee workloads, and a demonstration of the systems used by SSA to account for payees and keep track of misuse allegations. The Board will continue its research on the representative payee program in 2016.

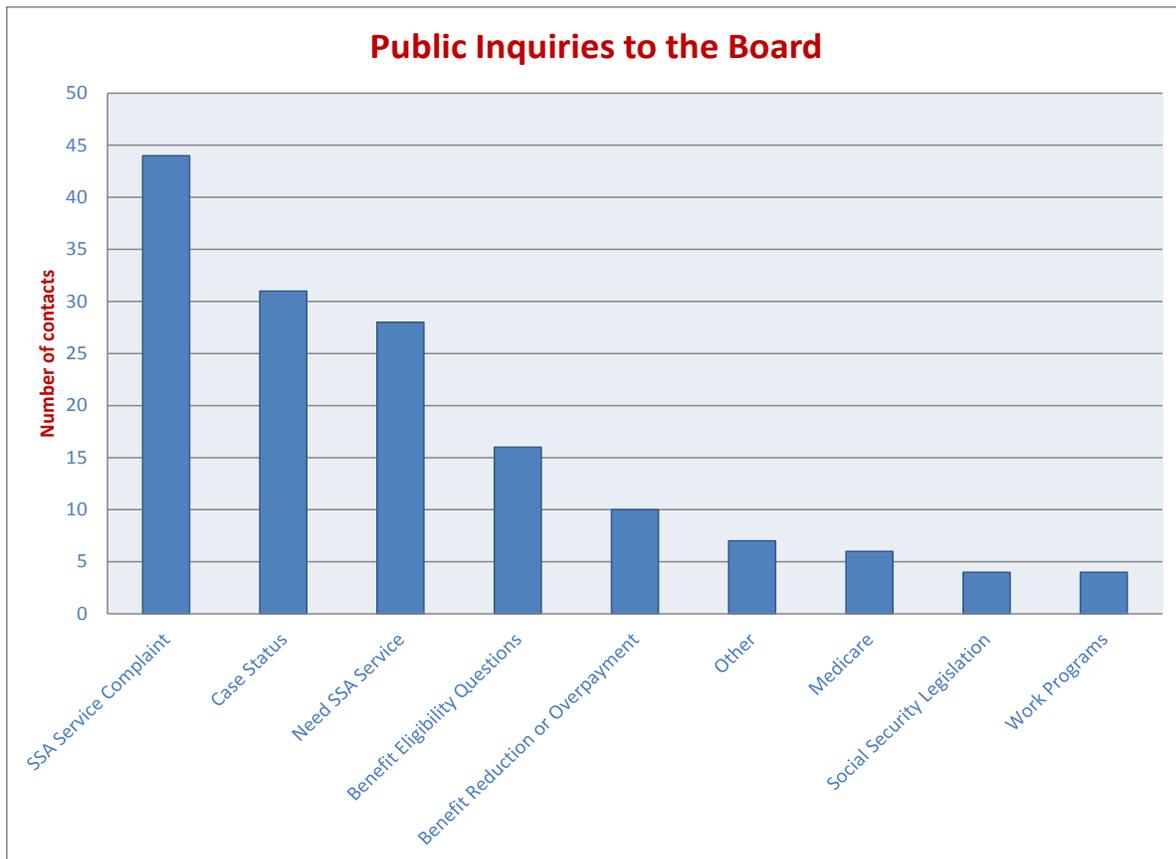


Website Redesign

In 2015, the Board launched a website redesign that will be completed in 2016. The new website will provide a more user-friendly interface and will allow for dynamic search features. The new website will prominently display key information, documents will be more accessible, and updates will be easier to implement. The website will also incorporate design guidelines from the US Digital Service for improving federal websites.

Public

The Board regularly receives correspondence and phone calls from the public about Social Security. As part of its broader mission to serve and educate the public, the Board responds to and tracks those communications. Board staff uses these contacts to gather feedback about issues facing the public in its interaction with the Social Security programs. While the Board communicates that it is independent from SSA and cannot resolve issues on individual claims or access case files, staff answer questions, give general information about the claims process, and will try to refer individuals to the appropriate SSA component or congressional office. In urgent need circumstances, Board staff will alert SSA of an issue. In 2015, Board staff tracked 135 contacts with the public, including letters, faxes, emails, and phone calls. Top reasons for contacting the Board included 1) complaints about SSA service; 2) questions about pending cases and benefits; and 3) needing service from SSA.



Inquiries

SSA Service Complaints. SSA service complaints encompass a broad category of dissatisfaction. Complaints sometimes arose after confrontation with SSA staff. More often, the public expressed dissatisfaction with the timeliness of service—including long wait times on the phone, lengthy processing times for benefit payments, and disability decisions at the hearings level. Other complaints allege incorrect determinations regarding benefits.

Case Status. Members of the public often contact the Board because they have been waiting months for SSA to process an award claim for benefits. Individuals want to know when they will begin receiving monthly benefits or their lump sum back payment and are often exasperated at the lengthy wait and lack of information provided by SSA. While hearing wait times are well publicized, the public occasionally must wait additional months, even after being awarded benefits due to additional administrative actions that need to be completed.

Need SSA Service. The Board receives frequent calls from the public seeking help contacting or receiving a service from SSA, such

as obtaining a new Social Security card, accessing case files, or receiving information about filing a claim or appealing a decision. Some mistakenly contact the Board instead of SSA, while others contact the Board after finding SSA unhelpful. Based on the situation, Board staff will provide referral information.

Benefit Eligibility Questions. Individuals often contact the Board to inquire about their eligibility for a program. While Board staff cannot answer specific questions about an individual's eligibility, they can provide some basic information about program eligibility requirements, assist in answering general questions, and direct people to the section of the SSA website that discusses eligibility requirements.

Benefit Reduction or Overpayment. Board staff often hear from individuals after benefit reductions or terminations. Most callers are requesting a detailed explanation since SSA notices are often hard to understand. As most cases are highly technical, callers are typically referred to the local field office or SSA's toll-free number.

Other. The other category encompasses all other types of complaints not necessarily related to programmatic issues.

Medicare. The Board occasionally receives inquiries concerning Medicare eligibility as it relates to receipt of Social Security benefits. These questions are typically directed to the Medicare hotline.

Social Security Legislation. The public sometimes contacts the Board about Social Security legislation they would like to see enacted, including changes to WEP, Government Pension Offset, and the annual Cost-of-Living-Adjustment.

Work Programs. Several members of the public contacted the Board with questions about Social Security return-to-work programs in 2015, including questions about Ticket-to-Work and how working would affect their benefits. Staff answered general questions and directed individuals to the appropriate SSA website for more information.

Board Staff



Jenn Rigger joined permanent Board staff in September 2015. Ms. Rigger currently serves as a senior policy advisor.

SSA Detailees

The Board benefited from the expertise of several SSA detailees in 2015. Teron Gorham from Office of Central Operations/Office of Earnings and International Operations was on detail to the Board from May to September. Jenn Rigger from the Office of Research, Demonstration, and Employment Support and Teresa Pfender from the Office of Appellate Operations came to the Board in March. Ms. Pfender finished her detail in September, while Ms. Rigger joined the Board staff permanently in September, along with Ms. Anita Grant, who detailed to the board in late 2014 and also became permanent in September 2015.

Fellowships, Research Assistants, and Intern Program

Every year, the Board brings on fellows, research assistants and interns to conduct research, perform administrative functions, and provide fresh insights into the Social Security programs. In 2015, two fellows from the National Academy of Social Insurance, Amber Davis and Claire Jensen, worked on projects during the summer. Ms. Davis worked on the SSI Children's report and Ms. Jensen assisted with research on an assortment of topics, including the representative payee program, electronic health records, ALJ hiring, and the definition of disability. As a summer intern, Carlie Augustin assisted in researching ALJ hiring, the SSI children's program, and SSA's definition of disability from May until August. Ms. Augustin also supported staff members with office administration. Intern Tony Marealle served as the administrative assistant from March until December.



Anita Grant joined permanent Board staff in September 2015. Ms. Grant has been instrumental in establishing Board management and administrative procedures.

New Staff

Caitlyn Tateishi joined the Board in April 2015. She was hired as administrative support, but quickly began taking on additional responsibilities including budget execution and drafting Board reports.



Who We Met With

2015 Board Meetings

JANUARY

Andrew "LaMont" Eanes, Senior Advisor to the Acting Commissioner and nominee for Principal Deputy Commissioner, SSA
Nancy Berryhill, Deputy Commissioner, Operations, SSA
Kathleen Romig, Senior Research Analyst at the Office of Retirement Policy, SSA
Daniel L. Hatcher, Professor of law, University of Baltimore, Civil Advocacy Clinic
David Wittenburg, Associate Director of Health Research Mathematica Policy Research
Manasi Desphande, Ph.D. Candidate in Economics at Massachusetts Institute of Technology and Pre-doctoral Fellow at the National Bureau of Economic Research

FEBRUARY

Patrick O'Carroll, Inspector General, SSA
Ken Nibali, Associate Commissioner for Disability, SSA, Retired
Art Spencer, Associate Commission for Disability Policy, SSA, Retired
Teresa Pfender, ODAR, Appeals Officer, training development and coordination lead
Sam Bagenstos, Professor of Law, University of Michigan

MARCH

Board Trip to New York:
Fred Maurin, Regional Commissioner
Julio Infiesta, Acting Deputy Regional Commissioner
Bryant Wilder, Acting Assistant Regional Commissioner, Management and Operations Support
Ray Egan, Acting Deputy Assistant Regional Commissioner, Management and Operations Support
Bernie Bowles, Executive Officer
Jeremiah Schofield, Acting Assistant Regional Commissioner, Processing Center Operations
Frank Barry, Deputy Acting Assistant Regional Commissioner, Processing Center Operations
John Shallman, Regional Communications Director

Caren Unger, Chief, Operations Support Branch, Northeastern Program Service Center
Rick Bailey, Area Director Manhattan, Bronx, Staten Island and lower Hudson Valley
Dean Frenkian, Area Director, New Jersey
Andrea Wilder, Area Director, Brooklyn, Queens and Long Island
John Shallman, Regional Communications Director
Dan Karp, Center Director, Automation
Victoria Shteyman, Deputy Center Director, Automation
Joe Cafaro, Acting Center Director, Disability
Melissa Bruckner, Deputy Center Director, Disability
Stephanie Francis, Center Director, Materiel Resources
Greg Narowski, Deputy Center Director, Materiel Resources
Mary Groot, Center Director, Programs Support
Tracey Saverino, Deputy Center Director, Programs Support
Diana Valdes, Center Director, Human Resources
Jonathan Addy, Deputy Center Director, Human Resources
Denise Hachicho, Teleservice Center Operations Director
Althea Phipps, Civil Rights and Equal Opportunity Director
Andrew Poulos, President, AFGE
David W. Ramsay, Director, NJ Division of Disability Determination Services
Gloria Toal, Deputy Commissioner, NY Office of Temporary and Disability Assistance
Joseph Cafaro, Director, NY Regional Center for Disability
Melissa Bruckner, Deputy Center Director, NY Regional Center for Disability
Monica LaPolt, Acting Regional Chief
ALJ Thomas Harper, Regional Management Officer
Steven P. Conte, Regional Chief Counsel
Som Ramrup, Deputy Regional Chief Counsel
Edward J. Ryan, Special Agent in Charge, Office of the Inspector General
John Grasso, Assistant Special Agent in Charge, Office of the Inspector General
Andrea Wilder, Area Director, Boro Hall District Office
Melvina Douse, District Director, Boro Hall District Office

MARCH CONTINUED

Valerie McNeil, Card Center Manager, Brooklyn Card Center
Ann Biddle, South Brooklyn Legal
LaTanya White, South Brooklyn Legal
John Welling, M. Ed, CRC, MetLife
Director, LTD Specialty Operations, MetLife
Jane Zanca, Regional Public Affairs
Linda Lauria, Regional Public Affairs
Reita Pierre Louis, Civil Rights and Equal Opportunity
Skarlent Rymmer, Civil Rights and Equal Opportunity
Janet Whittaker, Civil Rights and Equal Opportunity
Sonya Huggins, Management and Operations Support
Jessie Gomes, Center for Disability
Ana Javan, Center for Disability
Ed Krottendorfer, Center for Disability
Maria Lora, Center for Disability
Susan Palais, Center for Disability
Sylvia Peterson, Center for Disability
Eric Wolf, Center for Disability
Mitchell Kraft, Center for Material Resources
Joseph Lopez, Center for Material Resources
Sharon Badri-Persaud, Center for Material Resources
Nancy Millan, Center for Material Resources
Shameen Kenan, Center for Material Resources
Phillip Adase, Center for Material Resources
Glen Masi, Center for Material Resources
Marc Fiderer, Center for Material Resources
Jenica Wu, Center for Material Resources
Diana Reyes, Center for Human Resources
Luz Roldos, Center for Human Resources
Amarkys Brito, Center for Human Resources
Eno Ikoli, Center for Human Resources
Sophia Khani, Center for Human Resources
Tanya Sani, Center for Human Resources
Melinda Gilmore, Center for Human Resources
Kenya Brown, Center for Human Resources
Elizabeth Ortiz, Center for Human Resources
Jessica Rivera, Center for Automation and Security
Luis Diaz, Center for Automation and Security
Katia Gomez, Center for Automation and Security
Bill Rossi, Center for Automation and Security
Man Fan Lam, Center for Automation and Security
Peter Lee, Center for Automation and Security
Michael Jameson, Center for Automation and Security
Narinda Kuamar, Center for Automation and Security
Rolando Ruiz, Center for Automation and Security
Andrew Young, Center for Programs Support
Colleen Sheehan, Center for Programs Support
Elizabeth Roback, Center for Programs Support
Lisa Sobieski, Center for Programs Support
Anania Rufino, Center for Programs Support
Angela Caruso, Center for Programs Support
Lauren Hsu, Center for Programs Support
Kelly Francis, Center for Programs Support
Linda Lopez-Vasquez, Center for Programs Support

APRIL

Stephen Goss, Chief Actuary, SSA
Carolyn Colvin, Acting Commissioner, SSA

MAY

Joe Lytle, Acting Associate Deputy Commissioner, Income Security Programs, SSA
Shirleeta Stanton, Associate Commissioner, Income Security Programs, SSA
Eric Ice, Director, Office of Payment and Claimant Representation Policy, SSA
John Jankowski and Richard Chard, Senior Researcher, Office of Research, Evaluation, and Statistics, SSA
Patricia Portrzebowski, Executive Director, National Association of Public Health Statistics and Information Systems
Michelle King, Acting Assistant Deputy Commissioner, Office of Budget, Finance, Quality, and Management, SSA
Patrick Perzan, Acting Deputy Associate Commissioner, Office of Budget, SSA
Jon Tortora, Acting Associate Commissioner, Office of Anti-Fraud Programs, SSA

JUNE

Patrick O'Carroll, Inspector General, SSA
Gale Stallworth Stone, Deputy Inspector General, SSA
Carolyn Colvin, Acting Commissioner, SSA
Marianna LaCanfora, Assistant Deputy Commissioner Office of Retirement and Disability Policy, SSA
Dan Zabronsky, Division Director, Office of Budget, Finance, Quality, and Management, Office of Quality, and Management, Office of Quality Improvement, Office of Modeling, SSA
Committee for a Responsible Federal Budget,
Mike Murphy, Chief of Staff, Director of Strategic Initiatives
Marc Goldwein, Senior Vice President, Senior Policy Director
Edward Lorenzen, Senior Advisor
Alexandra De Filippo, Policy Analyst

JULY

Bill Hoagland, Senior Vice President Bipartisan Policy Center
David Hoppe, Senior Advisor Bipartisan Policy Center
Shai Akabas, Associate Director of Economic Policy Bipartisan Policy Center
Brian Collins, Senior Policy Analyst Bipartisan Policy Center
Dr. Ephraim Feig, CEO of Topwhats, Inc., Former Associate CIO (2010 – 2012), SSA
Robert Klopp, Deputy Commissioner, Chief Technology, SSA
Steve Goss, Chief Actuary, SSA

SEPTEMBER

Technical Panel Members:

Alicia Munnell, Peter F. Professor of Management Sciences, Boston College's Carroll School of Management & Director, Center for Retirement Research at Boston College
Katharine Abraham, Professor at Survey Methodology, Maryland Population Research Center
David Autor, Professor and Associate Department Head, MIT Department of Economics
Jeffrey Brown, Professor of Finance, William G. Karnes & Director, Center for Business and Public Policy at the University of Illinois
Peter Diamond, Institute Professor, Massachusetts Institute of Technology
Sam Gutterman, Retired as Director and Consulting Actuary, Pricewaterhouse Coopers LLP
Michael Teitelbaum, Senior Research Associate, Harvard Law School Labor and Work life Program
Joe Silvestri, Senior Actuary, U.S. Government Accountability Office

OCTOBER

Representative Payee Symposium:

Virginia Reno, Office of Retirement and Disability Policy, SSA
Marianna LaCanfora, Office of Retirement and Disability Policy, SSA
Kleo Debelius, Office of Income Security Programs, SSA
Ann-Maria Beard, Office of Income Security Programs, SSA
Angela Hood, Office of Income Security Programs, SSA
Paul Sapia, Office of Income Security Programs, SSA
Shirleeta Stanton, Office of Income Security Programs, SSA
Dana Vander Veen, Office of Legislation and Congressional Affairs, SSA
John Jankowski, Office of Research, Evaluation and Statistics, SSA
Lisa Rayo, Office of General Counsel, SSA
Dan Zabronsky, Office of Quality Improvement, SSA
Lori Vandeventer, Office of Public Service and Operations Support, SSA
Rafael Moya, Office of Applications and Supplemental Security Income Systems, SSA
Frank Elliot, Office of Applications and Supplemental Security Income Systems, SSA
Pan Van Der Meulen, Office of Applications and Supplemental Security Income Systems, SSA
Padma Nibhanupudy, Office of Applications and Supplemental Security Income Systems, SSA

NOVEMBER

Judy Chesser, Office of Legislation and Congressional Affairs, SSA
Daniel Bertoni, Education, Workforce and Income Security, U.S. Government Accountability Office
Terrie Gruber, Office of Disability Adjudication and Review, SSA
Donna Calvert, Office of Disability Adjudication and Review, SSA
Gerald Ray, Office of Appellate Operations, SSA

DECEMBER

Jim Klein, Director, San Francisco Audit Division, Office of the Inspector General, SSA
Rona Lawson, Deputy Assistant Inspector General for Audit, SSA
Kathleen McManaman, VA Fiduciary Program
Amy Shuart (R-Majority) & Kathryn Olson (D-Minority), Ways and Means Committee
Tom Klouda (D-Minority) & Jeff Wrase (R-Majority), Senate Finance Committee
Joel Eskovitz (D-Minority), Special Committee on Aging
Nancy Berryhill, Deputy Commissioner Operations, SSA

1997-2015 Compendium

Publications

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- Developing Social Security Policy: How the Social Security Administration Can Provide Greater Policy Leadership, March 1997.
- Increasing Public Understanding of Social Security, September 1997.
- Strengthening Social Security Research: The Responsibilities of the Social Security Administration, January 1998.
- Supplemental Security Income Statement, May 1998.
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- Disability Decision Making: Data and Materials (Part I), January 2001.
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- Charting the Future of Social Security's Disability Programs: The Need for Fundamental Change, January 2001.
- Agenda for Social Security: Challenges for the New Congress and the New Administration, February 2001.
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- The Social Security Definition of Disability, October 2003.
- Supplemental Security Income Statement, May 2004.
- Annual Report 2003, May 2004.
- SSAB Statement on CBO Projections, June 2004.
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- Supplemental Security Income Statement, May 2005.
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- The Impact of Immigration on Social Security and the National Economy, December 2005.
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- Annual Report 2005, September 2006.
- Recruiting SSA Administrative Law Judges: Need for Review of OPM Role and Performance, April 2007.

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- Annual Report 2006, August 2007.
- Supplemental Security Income Statement, May 2008.
- Annual report 2007, August 2008.
- Working for Retirement Security, September 2008.
- Challenges Facing the Social Security Administration: Present and Future, December 2008.
- Disability Programs in the 21st Century Series: Interactions between Supplemental Security Income and Temporary Assistance for Needy Families, February 2009.
- Disability Programs in the 21st Century Series: Need for Review of the Supplemental Security Income Program's Benefit Levels, Asset Limits, and Income Exclusions," March 2009.
- Disability Programs in the 21st Century Series: Substantial Gainful Activity, April 2009.
- Bridging the Gap: Improving SSA's Public Service through Technology, April 2009.
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- Statement on the Supplemental Security Income Program: A Look Back at the Last 10 Years, May 2009.
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- The Unsustainable Cost of Healthcare, September 2009.
- Disability Programs in the 21st Century Series: The Representative Payee Program, September 2010. This paper also appeared in the Social Security Administration's Annual Report of the Supplemental Security Income Program as "Statement on the Supplemental Security Income Program, Additional Statement by the Social Security Advisory Board," May 2010.
- Annual Report 2009, August 2010.
- The Representative Payee Program, September 2010.
- Keeping the Record Straight – An Overview of How SSA's Data Exchange Program Works, December 2010.
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- Filing for Social Security Disability Benefits: What Impact Does Professional Representation Have on the Process at the Initial Application Level? September 2012.
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- Facing the Challenges – Envisioning the Future – Transition Document for SSA, July 2013.
- Position Paper: The Case for Terminating the Benefit Offset National Demonstration, August 2013.
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- Position Paper: The Online Statement and MySSA Portal: SSA Should Take Additional Steps to More Effectively Communicate with the Public, December 2013.
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- Annual Report 2014, September 2015.
- The Windfall Elimination Provision: It's Time to Correct the Math, October 2015.

REPORTS TO THE BOARD

- The 1999 Technical Panel on Assumptions and Methods, November 1999.
- Alternative Approaches to Judicial Review of Social Security Disability Cases, March 2002.
- Introducing Nonadversarial Government Representatives to Improve the record for Decision in Social Security Disability Adjudications, May 2003.
- The 2003 Technical Panel on Assumptions and Methods, October 2003.
- Overview and Discussion of the Social Security Mortality Projections, May 2005.
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- 2014 Disability Policy Panel: Continuing Disability Reviews, December 2014.
- 2015 Technical Panel on Assumptions and Methods, September 2015.
- Rethinking the Promoting Opportunity Demonstration Project: A Report to the Board, May 2016.

Board publications can be accessed at: <http://ssab.gov/Our-Work>





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