



# Social Security Advisory Board

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Henry J. Aaron, Chair  
Lanhee J. Chen  
Bernadette Franks-Ongoy  
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Claire Green, Staff Director

## **Board Meeting Minutes April 28, 2017**

**Location:** 400 Virginia Avenue SW, Suite 625  
Washington, D.C. 20024

**Time:** 9:00 am – 3:45 pm

**SSAB Members:** Henry Aaron, Chair  
Lanhee Chen  
Bernadette Franks-Ongoy  
Jagadeesh Gokhale  
Kim Hildred

**SSAB Staff:** Claire Green, Staff Director  
Anita Grant, Senior Advisor  
Jenn Rigger, Senior Advisor  
David Warner, Management Chief  
Joel Feinleib, Staff Economist  
Matthew Comey, Policy Analyst  
Caitlyn Tateishi, Management Analyst  
Bethel Dejene, Management Analyst  
Mathew Graves, Research Analyst  
Joyce Nicholas, Senior Policy Analysts,  
SSA Detailee

### **Presenters**

**SSA Participants:** Erik Jones, Assistant Deputy Commissioner for  
Operations

**NCSSMA Participants:**

By Conference call: Chris Detzler, President  
(Vancouver, WA)  
Val Fisher, Vice President (New Brunswick, NJ)  
Beth Williams, Treasurer (Mt. Prospect, IL)  
Becky Archer, Executive Officer (Reno, NV)  
Rick Warsinsky, Immediate Past President  
(Cleveland Downtown, OH)  
Peggy Murphy, Executive Committee Member  
(Great Falls, MT)  
Vanessa Martin, Executive Committee Member  
(Martinsburg, WV)  
Rachel Emmons, Washington Representative

The Board met with Erik Jones, SSA Assistant Deputy Commissioner for Operations, who presented the agency's perspective on the Social Security Administration's (SSA's) program service center (PSC) workloads and resources. As reported by Mr. Jones, the central issue facing PSCs is that based on the current workloads there is a shortfall of 1,100 work years, i.e., the gap between the amount of work current staff is able to be performed in a single year and the amount of work that SSA believes needs to be done in that year is equivalent to the work capacity of 1,100 full-time, year-round staff. Greater automation and more efficient systems could help close this gap and reduce the amount of work years necessary to catch up. There has been a growing problem with checks from beneficiaries trying to return overpayments not being logged into the system and properly processed. A new process to pay these remittances online, instead of by paper check, is being pursued by SSA, but is not in place yet.

The trend at SSA is towards greater automation and pulling staff from the "front lines" (field offices) and "centralizing them" (in PSCs). Since workloads are transferred between PSC's when one PSC experiences high volume while another experiences low volume, the time it takes to process a similar amount of claims is about the same across the PSCs. In an effort to provide more centralized oversight of work at PSCs, SSA has a new dedicated, centralized office of customer service. The Board agreed that productivity measures such as work years are important for analysts to understand and help improve the processes at SSA. To further evaluate the existing workloads the Board requested and SSA agreed to provide the current staffing levels at each PSC, the current productivity measures, and a measure of the total workload.

The Board met via teleconference with representatives of the National Council of Social Security Management Associations (NCSSMA). The purpose was to hear a ground-level perspective on the issues facing SSA field offices and specifically the PSCs. Although NCSSMA does not represent PSC staff the field office and PSC work closely together. The meeting began with a brief discussion of asset limits in the Supplemental Security Income (SSI) program. NCSSMA has been looking into the issue of SSI asset limits for years and believes that a change in the asset limit would not have a large effect on the administration of the program. NCSMMA members indicated that raising the asset limit could aid in beneficiaries' transitions from SSI to work, though there is a lack of hard evidence to support this assertion. Furthermore, the existing PASS program (Plan to Achieve Self-Support) is designed to help people save for stated work-related objectives without triggering the SSI asset limit, but the program is not commonly used.

NCSSMA also discussed the growing workloads at PSCs. The same issue discussed with Mr. Jones was also raised with NCSSMA members, who stated that there are tens of thousands of remittance payments that remain unprocessed in PSCs. There was some disagreement between Mr. Jones and the NCSSMA members as to how to address the backlogs at the PSCs. SSA Operations prefers increased centralization through the greater utilization of PSCs, while NCSSMA prefers capitalizing on the efficiencies of SSA field offices by authorizing more functions to be done in field offices. It was agreed that a promising course of action may be for NCSSMA and SSA Operations to come together at a meeting, possibly facilitated by the Board, to resolve discrepancies and identify common solutions.

I certify that the minutes written for the April 28, 2017 meeting of the Social Security Advisory Board are correct.



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Henry J. Aaron