



# OVERVIEW OF OUR FISCAL YEAR 2023 GOALS AND RESULTS

## How We Manage Performance

**Performance Framework:** The *Government Performance and Results Modernization Act of 2010* (GPRMA) describes how agency strategic plans and goals align with presidential terms and broader Federal efforts.

Setting goals and measuring our performance are vital to our success. We define our performance framework in the [Fiscal Years \(FY\) 2022–2026 Agency Strategic Plan \(ASP\)](#). Our ASP defines our Strategic Goals and details underlying Strategic Objectives, strategies, and relevant risks and mitigation plans.

Our Strategic Goals are:

Strategic Goal 1: Optimize the Experience of SSA Customers;

Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce; and

Strategic Goal 3: Ensure Stewardship of SSA Programs.

**Planned Performance:** In March 2023, we published our [Annual Performance Plan for FY 2024, Revised Performance Plan for FY 2023, and Annual Performance Report \(APR\) for FY 2022](#) as part of the [President's FY 2024 Budget Request](#). We refer to this consolidated plan and report as the APR. The APR outlines our tactical plans for achieving the Strategic Goals and Objectives in our ASP, finalizes our FY 2023 performance commitments, and describes how we ensure data integrity of our performance information. The budgeted workloads published in our APR correspond to the key workload measures in the [FY 2023 Operating Plan](#).

**Actual Performance and Program Results:** We update the APR after the close of the fiscal year to provide performance results for the previous fiscal year. We plan to publish the final APR containing our actual FY 2023 results in February 2024. The final APR will be available on our [website](#).

This *Agency Financial Report* summarizes our strategic initiatives, overall performance results, and financial activities we conducted to carry out our mission in FY 2023. The following table shows our operating expenses by Strategic Goal and Objective.



### Remember! You Can Access Our Services Online

Our [online services](#) allow you to request a replacement Social Security card (in most States), print a benefit verification letter, and more—from anywhere and from any of your devices!

## FY 2023 Operating Expenses by Strategic Goal and Strategic Objective (Dollars in Millions)

<b>Strategic Goal 1: Optimize the Experience of SSA Customers</b>	<b>\$11,244</b>
Strategic Objective 1.1: Identify and Address Barriers to Accessing Services	\$1,185
Strategic Objective 1.2: Expand Digital Services	\$1,871
Strategic Objective 1.3: Build a Customer-Focused Organization	\$8,188
<b>Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce</b>	<b>\$653</b>
Strategic Objective 2.1: Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement	\$191
Strategic Objective 2.2: Support Employees' Chosen Career Paths	\$462
<b>Strategic Goal 3: Ensure Stewardship of SSA Programs</b>	<b>\$2,719</b>
Strategic Objective 3.1: Improve the Accuracy and Administration of Our Programs	\$1,960
Strategic Objective 3.2: Identify and Eliminate Potential Barriers to Access Contracts and Grants	\$19
Strategic Objective 3.3: Improve Organizational Performance and Policy Implementation	\$740

**Priorities:** In support of the GPRMA, we established three Agency Priority Goals (APG), which are 24-month goals reflecting our top priorities. We routinely review our progress and take actions to improve our outcomes, promote innovation, and deliver favorable results.

For FYs 2022–2023, our APGs were:

1. Improve Equity in the Supplemental Security Income Program.
2. Improve the National 800 Number Service.
3. Improve Initial Disability Claims.

We made notable progress towards our goal of providing increased outreach and improved benefit delivery, including to communities of color and underserved communities. By September 30, 2023, we increased the number of all SSI applications by nearly 15 percent, relative to the 2021 baseline, restoring rates closer to pre-pandemic levels, as well as increased the number of SSI applications from underserved communities by over 25 percent, relative to the 2021 baseline.

We set ambitious FYs 2022–2023 APG targets to improve the average processing times for initial claims and to work down older cases and to reduce the average speed of answer on our National 800 Number. In FY 2023, we processed over 90,000 more initial disability claims than we did in FY 2022. While we did not achieve our plan to reduce the average wait time to 164 days for all initial claims, we are prioritizing these efforts. In addition, we completed about 97 percent of our cases that started FY 2023 pending 180 days or more, surpassing our APG target of 85 percent. Similarly, while our 36 minute average speed of answer is greater than the 12 minutes projected in the APG, we are diligently working to establish the technology to improve service.

Please visit [Performance.gov](https://www.performance.gov) to see our APG goals, progress, results, and how we focus leadership priorities to drive progress and change.



## Summary of Fiscal Year 2023 Performance

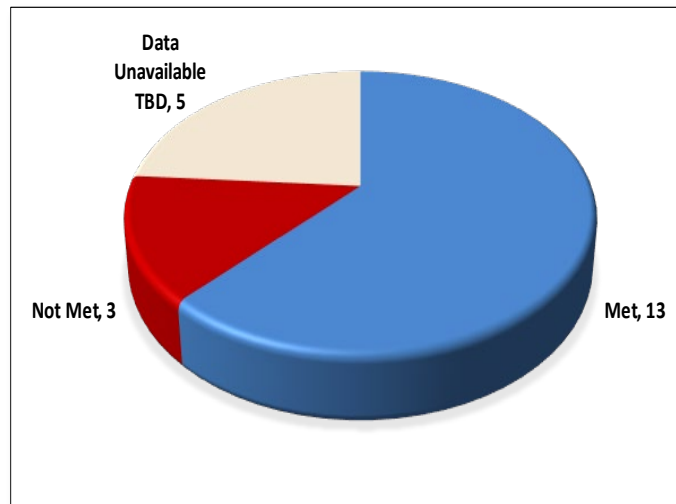
This section provides an overview of progress made in accomplishing the strategic objectives and performance measures and targets included our published [FYs 2022–2024 Annual Performance Plan and Report](#). We highlight the approaches we used to achieve our FY 2023 performance measures, outline some of the challenges we faced meeting these goals, and provide an analysis of our performance.

Our budget directly drives the level of service we can deliver, including systems improvements and staffing to stay current with our workloads. While we face multiple challenges to restore service delivery to the standards both we and the public expect, we are working diligently to do so within our resource levels.

For FY 2023, we have 21 performance measures that we use to track progress toward meeting our Strategic Goals and Strategic Objectives. Overall, we met our targets for 13 of the 16 performance measures with available data. Final data for 5 of the remaining performance measure targets were not available at the time we published this report. The unavailable data results are indicated as to be determined (TBD). Additional details about available FY 2023 results are in the sections below.

We will publish final data for all performance measures in our *Annual Performance Plan for FY 2025, Revised Performance Plan for FY 2024, and Annual Performance Report for FY 2023* in February 2024.

### Summary of Our FY 2023 Performance Measure Results



# Strategic Goal 1: Optimize the Experience of SSA Customers

## Strategic Objectives

- 1.1 Identify and Address Barriers to Accessing Services
- 1.2 Expand Digital Services
- 1.3 Build a Customer-Focused Organization



Create a *my* Social Security account

[SSA.gov/myaccount](https://www.ssa.gov/myaccount)

Our goal is to optimize the experience of our customers by providing timely, accurate, and efficient access to our services. We strive to better understand our customers' evolving needs, advance inclusive policies, and ensure equity throughout our programs (e.g., targeted outreach to communities of color and underserved communities, expanded availability of online tools, and examination of disparities using data collection and analysis). What follows highlights our progress and challenges toward accomplishing our Strategic Goal and Objectives.

## **Strategic Objective 1.1: Identify and Address Barriers to Accessing Services**

We expanded our network of advocates and community-based organizations and met with them regularly to address the needs of people facing barriers to accessing our services. As outlined in our [Equity Action Plan](#), we are improving our ethnicity data collection, which helps us better understand how our programs work for different groups and take steps to better serve those groups.

We collected customer feedback to help us better understand customer perceptions, needs, and preferences. We captured real-time customer feedback across all service channels to help identify pain points along customers' journeys. We collected customer feedback for two of our priority service designations: (a) Filing for Social Security retirement benefits and (b) Applying for a replacement Social Security card. We streamlined our customer feedback platform with enhanced feedback channels and data collection tools. We also conducted customer research, pain point analysis, service design, stakeholder enablement, and performance measurement for our third priority service designation, Obtaining Adult Disability Benefits.

In FY 2023, we partnered with SSI outreach organizations and advocacy groups that help people apply for SSI, resulting in over 3,750 SSI claims filed. We completed over 19,000 outreach events for underserved communities. We developed Diversity, Equity, Inclusion, and Accessibility (DEIA) training that helps our adjudicators understand, recognize, and remove barriers to fair and equitable decision-making.



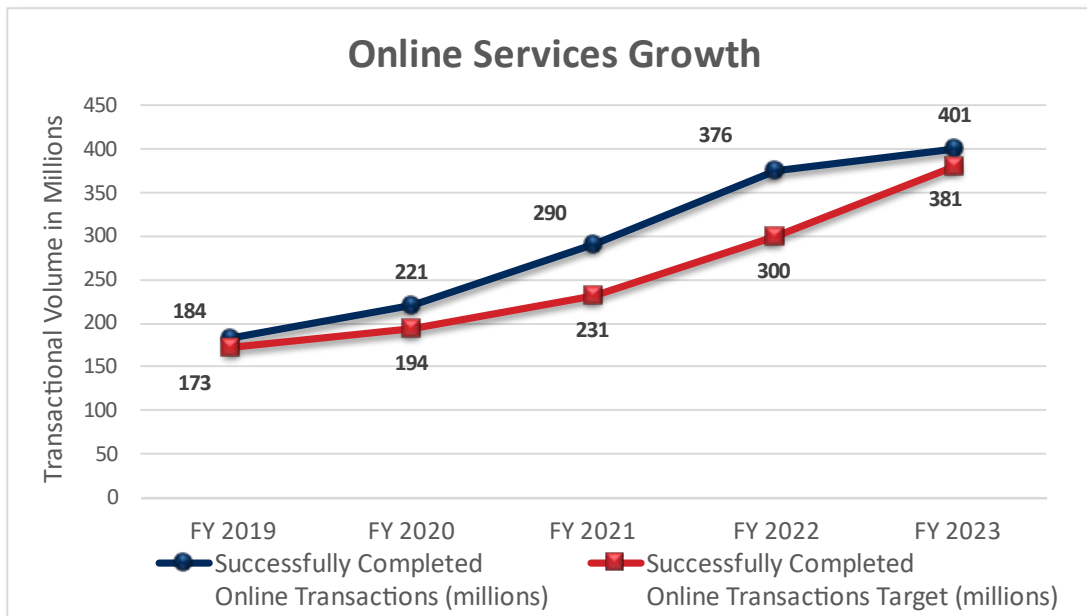
## Strategic Objective 1.2: Expand Digital Services

We enhanced the customer experience by providing convenient, user-friendly, and secure digital self-service options.

We began the rollout of our digital self-service option *Upload Documents* to allow individuals applying for or receiving certain services to upload forms, documents, or evidence associated with their transaction. We prioritized reviewing forms and policies to either remove signature requirements or allow electronic signature options. In FY 2023, we launched technician-initiated eSignature on 38 first-party forms.

Our online *my Social Security* portal offers a broad range of services, including changing an address or direct deposit information, getting personal retirement benefit estimates, and requesting a replacement Social Security Number (SSN) card.

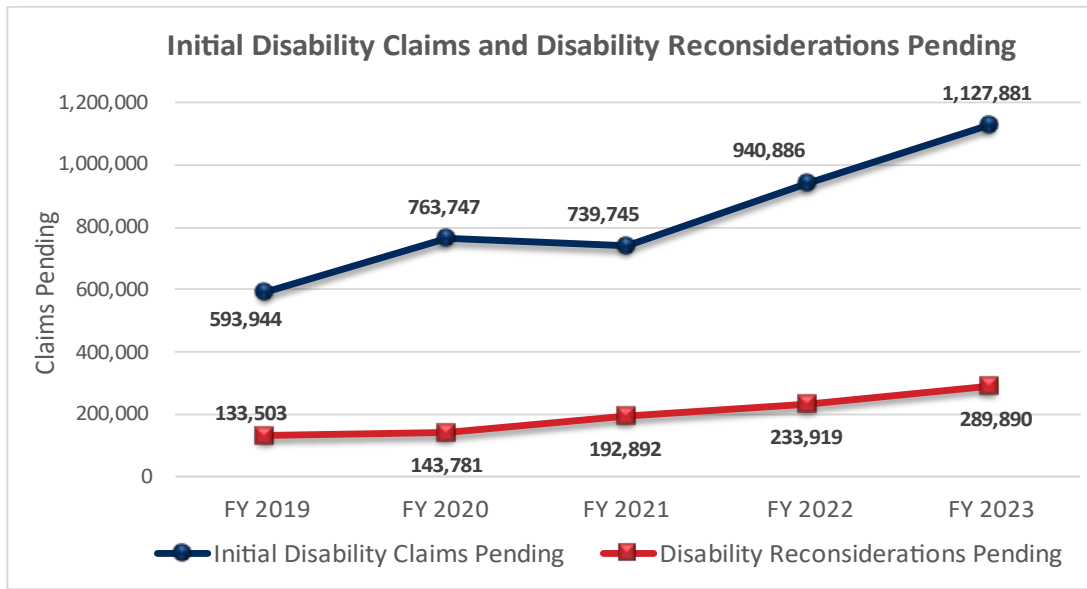
In FY 2023, we expanded our Internet SSN Replacement Card application to 47 States and Washington, DC, and customers can now change their name due to marriage in 9 States. We enhanced our online tax statement application (my1099), allowing customers to access historical benefit statements for five previous tax years. We implemented the *i454*, allowing adult beneficiaries to complete and submit the Medical CDR report online. We deployed our Enterprise Scheduling System to 50 States, Washington, DC, Puerto Rico, and the U.S. Virgin Islands, allowing customers to self-schedule enumeration appointments. We enhanced our text messaging services to allow customers to receive cost-of-living adjustment notice messages.



### Strategic Objective 1.3: Build a Customer-Focused Organization

We prioritized improving the national average processing time for initial disability claims and reconsideration claims. In FY 2023, we did not achieve our projected Initial Disability Claim average processing time performance, however, to address the growing volume of pending initial and reconsideration claims, we re-directed Federal resources to provide immediate, direct support for disability claims processing. We convened specialized workgroups to develop and implement solutions to eliminate the disability backlog and recruit and retain employees at the State level. We established a national contract to recruit and manage medical and psychological consultants and issued guidance permitting telehealth for certain consultative examinations. We also onboarded 2 large health networks and 20 new health partners to increase the submission of electronic medical evidence and utilize software to generate a list of cases containing medical evidence that will likely meet or equal a medical listing. We improved disability, hearings, and appeals case processing systems through our enterprise-wide efforts to develop and implement modern, national claims processing systems.

Our Processing Centers (PC) process highly complex cases that require manual handling. We remain focused on addressing a backlog of pending actions. We took steps to address the backlog by transferring workloads among all the PCs to ensure that all available processing capacity is engaged. We are also processing the oldest pending cases across all workloads while balancing the continued processing of younger case priorities. In FY 2023, we hired PC staff to help reduce pending actions.





The following dashboard shows our FY 2023 performance measures status, including the Strategic Goal, Objectives, and a brief summary of our performance:

### Strategic Goal 1: Optimize the Experience of SSA Customers Performance at a Glance

Strategic Objective	Performance Measure	Performance Results Met/Not Met	Performance Summary
1.1: Identify and Address Barriers to Accessing Services	1.1a: Redesign SSA's website to enhance the user's online experience	● <b>Met</b>	Customer satisfaction with our website was 69.7%, which exceeded our target to achieve a 1.5% increase from the 47.7% baseline.
	1.1b: Collect Customer Feedback	● <b>Not Met</b>	We did not establish end of journey feedback collection for priority service designations due to technical resource constraints.
1.2: Expand Digital Services	1.2a: Increase the number of successfully completed online transactions	● <b>Met</b>	We successfully completed 401.5 million online transactions, exceeding our FY 2023 target of 381 million online transactions and completing about 25.8 million more transactions than FY 2022.
	1.2b: Expand video service delivery	● <b>Not Met</b>	We continue to work through testing with DHS to issue non-U.S. Citizen replacement cards.
1.3: Build a Customer-Focused Organization	1.3a: Provide uninterrupted access to our systems during scheduled times of operations	● <b>Met</b>	Our systems availability was 99.95%, which exceeded our target of 99.90%.
	1.3b: Modernize evidence acquisition systems to drive increased electronic medical evidence volumes through a multi-channel strategy	● <b>Not Met</b>	We acquired 55% of our medical evidence electronically, which was less than our 56% target, and the same as FY 2022.
	1.3c: Improve customer service by reducing the number of actions pending at the processing centers	● <b>Met</b>	The number of actions pending at the processing centers was 4.6 million, below our target of 4.7 million.



## Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce

### Strategic Objectives

- 2.1 Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement
- 2.2 Support Employees' Chosen Career Paths



Our goal is to ensure our hiring and promotion practices promote equity, as we ensure our workforce delivers customer-focused service to diverse populations and reflects the diversity of the customers they serve. We are aligning our human capital policies and emerging technologies, to attract, train, develop, and retain our workforce. What follows are highlights of our progress and challenges toward accomplishing our Strategic Goal and Objectives.

### **Strategic Objective 2.1: Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement**

We implemented a proactive planning approach to ensure the effective hiring, development, and retention of a talented and diverse workforce. We conducted analyses on hiring and employee advancement through our annual [Management Directive 715](#) reporting process, and worked to improve policies and practices to ensure a representative workforce and maintain compliance with the *Architectural Barriers Act* Accessibility Standards. We reaffirmed our agency-wide policy on prohibiting discrimination, including harassment, based on sexual orientation, gender identity, or gender expression.

In FY 2023, we developed our FYs 2023–2026 Human Capital Operating Plan to address retention and attrition challenges through Strategic Workforce Planning. We conducted a DEIA analysis of our national mentoring program and established a workgroup with key agency stakeholders to identify strategies to increase the diversity of mentors. We announced direct hiring authority on our [Careers with SSA website](#), which allows managers to directly recruit and hire candidates to fill critical positions, and added inclusive language in our job announcements in support of our [DEIA Strategic Plan](#). Additionally, we updated our employee engagement resources, including executive and manager toolkits, to enable agency leaders to streamline workforce planning efforts and mitigate the impact of attrition.





## Strategic Objective 2.2: Support Employees' Chosen Career Paths

We focused on improving employee engagement, strengthening our performance management process, and ensuring equity in leadership development. We expanded and diversified applicant pools through targeted recruitment of underrepresented groups. We also employed tools that support executive and management development, including attrition and retention analysis, employee feedback surveys, and targeted Improving Workplace Morale plans.

In 2023, we launched our traditional Mentoring Program with 350 mentees and over 250 mentors. We hosted activities that included mentoring program guidance, action planning, and focus groups for program improvement. We implemented mini-flash mentoring events for over 5,600 employees, focusing on career development, interpersonal skills, and soft skills. We presented career development topics focused on planning, interviewing, and resources. We also hosted the National Leadership Development Program (NLDP) Preparatory Series (an NLDP improvement), offering prospective applicants a series of four training sessions to prepare for the FY 2024 NLDP assessment process.

The following dashboard shows our FY 2023 performance measures status, including the Strategic Goal, Objectives, and a brief summary of our performance:

### Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce Performance at a Glance

Strategic Objective	Performance Measure	Performance Results Met/Not Met	Performance Summary
2.1: Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement	2.1a: Enhance the leadership and executive pipelines through modernized national leadership and executive development programs	Met	We implemented 67% of NLDP improvements recommendations based on program evaluation feedback (NLDP Preparatory Series), exceeding our 50% target.
	2.1b: Increase the use of workforce data analyses to support executive workforce and succession planning and data-driven decision making	Met	We released four new workforce planning and analysis resources on Exercising Inclusive Decision-Making, Workload Prioritization Tool, Knowledge Sharing Tool, and Workforce Projections.
2.2: Support Employees' Chosen Career Paths	2.2a: Improve employee engagement	TBD	Results available in Q1 of FY 2024
	2.2b: Ensure new supervisors receive timely training to improve their leadership skills and competencies	Met	Ninety-six percent of new supervisors completed training within one year of the effective date of their supervisory appointment, which exceeded our 95% target, and is an improvement of about 14% compared to FY 2022.
	2.2c: Strengthen manager accountability for effective performance management	Met	We maintained 96% of performance documents within e7B, which matched our FY 2023 target.

## Strategic Goal 3: Ensure Stewardship of SSA Programs

### Strategic Objectives

- 3.1 Improve the Accuracy and Administration of Our Programs
- 3.2 Identify and Eliminate Potential Barriers to Access Contracts and Grants
- 3.3 Improve Organizational Performance and Policy Implementation



### Antifraud facts

Our goal is to ensure stewardship and the efficient administration of our programs, look for ways to improve the administration of our programs, and work to identify and address potential inequities. We focused our efforts on three major areas: improving program integrity, enhancing our fraud prevention and detection activities, and improving workforce performance and increasing accountability. What follows are highlights of our progress and challenges toward accomplishing our Strategic Goal and Objectives.

### **Strategic Objective 3.1: Improve the Accuracy and Administration of Our Programs**

Dedicated program integrity funding helped ensure individuals receive the benefits to which they were entitled and helped safeguard the integrity of benefit programs by confirming eligibility, improving payment accuracy for overpayments and underpayments, and preventing fraud.

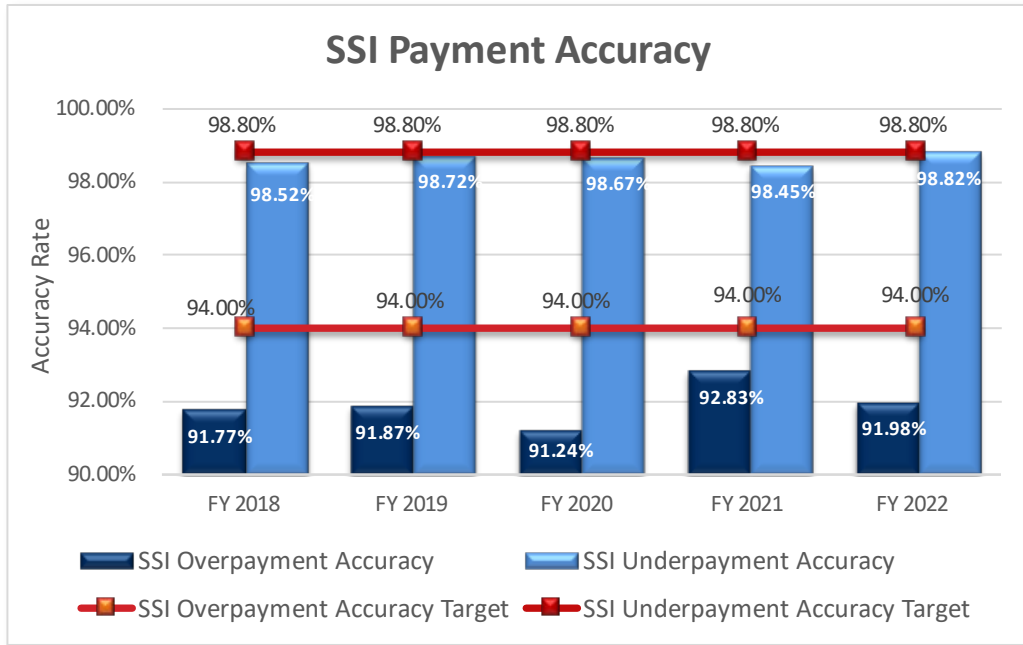
In addition, program integrity funding allows us to conduct SSI redeterminations, conduct the anti-fraud cooperative disability investigations program, and support special attorneys for fraud prosecutions. We will continue these efforts to ensure public confidence in our programs and operations and to ensure we are providing beneficiaries the correct benefits to which they are entitled.

Our online debt management processing provides beneficiaries with options to repay debts and enables us to effectively and efficiently post, track, collect, and report on overpayments. Our mobile wage reporting application and Optical Character Recognition functionality for scanning and uploading photographed documents makes it easier for SSI recipients to report wages from mobile devices.

In FY 2023, we mailed beneficiary notices regarding potential eligibility for higher benefits on their own earnings record and higher surviving divorced spouse benefits due to the death of their ex-spouse. We released videos on YouTube, social media platforms, and in field office waiting rooms explaining the importance of reporting wages and the various options available for reporting. We released the annual National Anti-Fraud Training to our employees, covering fraud and social media, organizational representative payee fraud, and identity theft.



We focused on improving our SSI payment accuracy, modernizing our debt management system, and expanding our cybersecurity program to ensure the integrity of our programs.



### Strategic Objective 3.2: Identify and Eliminate Potential Barriers to Access Contracts and Grants

We focused on eliminating potential barriers to acquisition and grant opportunities. We targeted outreach to Historically Black Colleges and Universities (HBCU) and Institutions Serving Students of Color (ISSC) to solicit feedback about our grantmaking process and potential barriers. We also communicated with bidders and recipients of our contracts for Historically Underutilized Business Zone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses to learn about their experiences with our procurement process, barriers they encountered, and recommended solutions to eliminate these barriers.

In FY 2023, we announced the Interventional Cooperative Agreement Program, Retirement and Disability Research Consortium, and Analyzing Relationships between Disability, Retirement, and Work funding opportunities to targeted research audiences, including 180 HBCUs and ISSCs. We hosted an Industry Day with over 300 registered small business contractors to present upcoming information technology modernization initiatives and associated contracting opportunities. We updated our Procurement Forecast on a quarterly basis.

### Strategic Objective 3.3: Improve Organizational Performance and Policy Implementation



We partnered with other Federal agencies to share data and develop strategies to address Government-wide initiatives. We increased the accuracy of our records, improved the customer experience, and increased organizational effectiveness, by providing SSN verifications and exchanging birth, death, prisoner, and benefit payment information, as permitted under law, with Federal, State, and private partners. We collaborated with the Department of Treasury and

Office of Management and Budget to initiate a new data exchange agreement to provide State death data to the Department of the Treasury for the Do Not Pay system, in support of *Consolidated Appropriations Act, 2021*. We also reached an agreement with the States on death data pricing.

In FY 2023, we hosted data exchange meetings with our Federal and private sector partners regarding confidentiality and disclosures, data safeguarding requirements, financial agreements, and the future of work. Additionally, we updated regulatory provisions to reflect advances in medical knowledge and emerging research by publishing a final rule to update the listing of impairments for Digestive and Skin Disorders.

The following dashboard shows our FY 2023 performance measures status, including the Strategic Goal, Objectives, and a brief summary of our performance:

### Strategic Goal 3: Ensure Stewardship of SSA Programs Performance at a Glance

Strategic Objective	Performance Measure	Performance Results Met/Not Met	Performance Summary
3.1: Improve the Accuracy and Administration of Our Programs	3.1a: Improve the integrity of the Supplemental Security Income program by focusing our efforts on reducing overpayments <sup>2</sup>	<b>TBD</b>	Results available in Summer 2024
	3.1b: Maintain a high payment accuracy rate by reducing overpayments, in the Old-Age, Survivors, and Disability Insurance program <sup>2</sup>	<b>TBD</b>	Results available in Summer 2024
	3.1c: Modernize our Debt Management System	 <b>Met</b>	We expanded our automated remittance processing capabilities by increasing the use of lockbox services for SSI remittances.
	3.1d: Ensure the quality of our decisions by achieving the State disability determination services net and decisional accuracy rate for initial disability decisions	<b>TBD</b>	Results available in January 2024
	3.1e: Maintain effective cybersecurity and privacy programs	 <b>Met</b>	We achieved 90% on the Chief Information Officer <i>Federal Information Security Modernization Act</i> Metrics Scorecard, exceeding our target of 81% and improving the agency's cybersecurity posture.

<sup>2</sup> Annual OASDI and SSI Stewardship Report results are available in the summer of the following year.



Strategic Objective	Performance Measure	Performance Results Met/Not Met	Performance Summary
	3.1f: Ensure timely and accurate payments to appointed representatives	● <b>Met</b>	We achieved an average processing time of 45 days, which was below our target of 60 days and an improvement of about 26 days on average compared to FY 2022.
3.2: Identify and Eliminate Potential Barriers to Access Contracts and Grants	3.2a: Small Business Administration annual scorecard success in contracting with Historically Underutilized Business (HUB) Zone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses	<b>TBD</b>	Results available in Spring of 2024
	3.2b: Increase funding for HBCUs and ISSCs	● <b>Met</b>	We increased funding by 110%, exceeding our target of 50% above the 4-year average.
3.3: Improve Organizational Performance and Policy Implementation	3.3a: Reduce our real property footprint	● <b>Met</b>	We achieved a 108,614 Useable Square Footage (USF) reduction, exceeding our target of 70,000 USF.



**Scammers Are Pretending to be Government Employees**  
**The Social Security Administration will never threaten, scare, or pressure you to take an immediate action.**

**DO NOT BE FOOLED! IF YOU RECEIVE A SUSPICIOUS CALL: DO NOT give them money or personal information!**

Report the scam at [oig.ssa.gov](https://oig.ssa.gov). For more information, visit our Antifraud Facts [website](#).

## Looking Forward – Facing Our Challenges

Millions of people depend on us for a financial safety net; it is imperative that we provide timely, quality service. To meet the critical needs of the public, we will enhance our services, advance our policies and business processes, and evolve our technological solutions. We are making clear our acceptable service levels to ensure we align our resources to achieve service improvements in our core workloads.

We are focused on rebuilding our workforce to address our service challenges. One of our key priorities is addressing our record backlogs in disability cases. We are diligently assisting the State DDSs who make disability decisions on our behalf. We are implementing new strategies to address recruitment and retention issues. We deployed Federal cadres to assist the DDSs in processing cases, especially where the DDSs face disproportionate staffing losses. We are using our disability case processing system and other technologies to help us identify cases that meet the criteria for expedited processing.

Our customers count on our National 800 Number agents to answer important questions. Too many people have experienced lengthy delays waiting to speak with an agent, particularly during our peak call periods. We have hired additional telephone agents and are transitioning our National 800 Number to a new service platform, our Next Generation Telephony Project, which we expect will improve some of our current service challenges.

We use technology to provide the public with convenient, user-friendly, and secure self-service options. More people are embracing the convenience of online services. We are improving the customer experience by expanding our digital services and modernizing our systems to provide the public with convenient online and automated service options.

We are committed to ensuring that our programs and services are reaching underserved communities and people facing barriers to accessing our services. We are continuing our SSI outreach work, including collaborating with Federal and State Government agencies and third-party organizations to make the public aware of potential benefit eligibility.

We are committed to climate adaptation and resilience planning to reduce climate change risks. Our [Climate Action Plan](#) reaffirms our vision to improve our capacity to assess and build resilience to climate change risks. We provide information on Climate-Related Financial Risk in the *Other Reporting Requirements* section.

We are working to better serve millions of people while maintaining strong stewardship and rigorous oversight of the programs we administer. We discuss additional program challenges as detailed in the *Highlights of Financial Position* section and Note 17, Social Insurance Disclosures, in the *Financial Statements and Additional Information* section.

